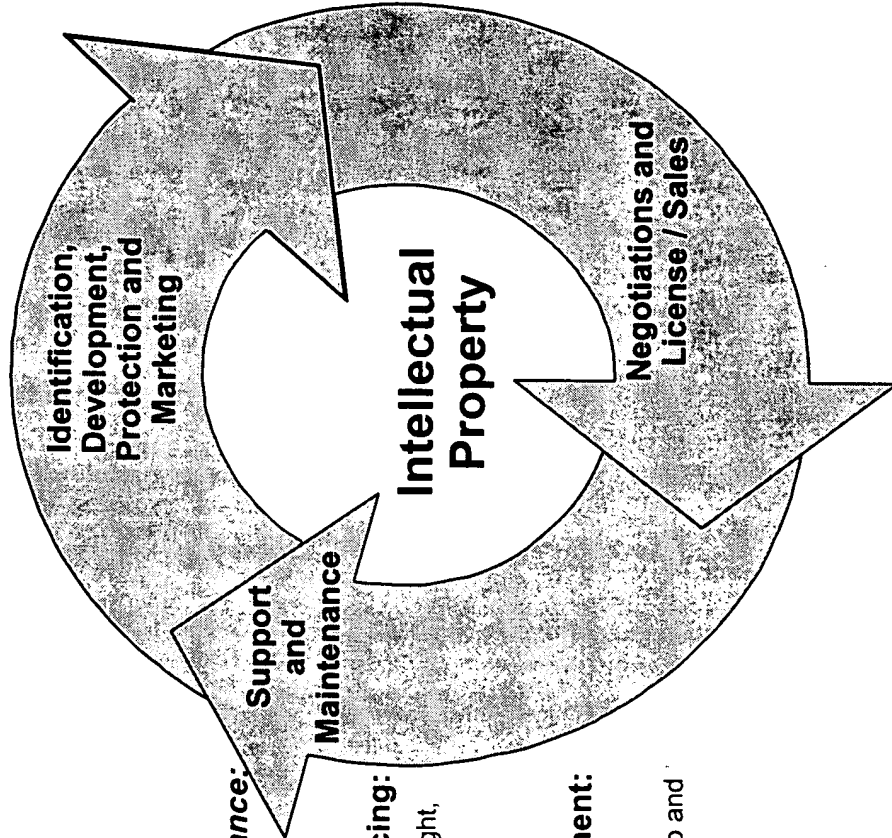


Continuous Intellectual Property Process



I. Identification, Development, Protection and Marketing:

- **Identification:**
 - Identify new intellectual property (invention, technology, ideas, brands)
 - Identify potential marketing opportunities
- **Development:**
 - Develop inventions, technology, ideas for IP protection
 - Develop marketing sales channels
- **Protection:**
 - Protect IP with patents, copyrights, trade secrets, trademarks
 - Protect with Non-Disclosure Agreements
- **Marketing:**
 - Market & competitive analysis
 - Financial analysis

II. Negotiations and License/Sales:

- **IP Negotiations (e.g., with customers, government agencies)**
- **License / Sales Initiation**
 - Contact vendors
 - Contact end users
- **Contract development, negotiation and completion**

III. Support and Maintenance:

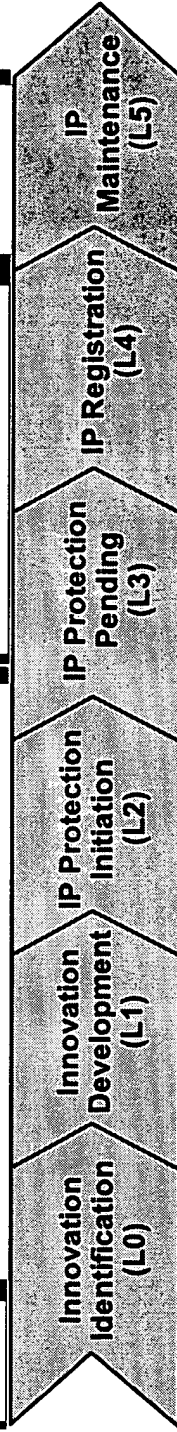
- **Internal reward and recognition programs**
- **IP protection and policing:**
 - Patent, trademark, copyright, trade secret, portfolio management
 - Policing IP
- **Relationship Management:**
 - Internal Entities
 - External Sales Partnership and End Users
- **Royalty Management**
- **Quality Standards Management**

FIG. 1

IP Protection Life Cycle

Continuous IP Process:

Support Identification, Development and Protection Negotiations and Sales Maintenance



Effort Spent: • 1-2 hours/product

- 1-2 hours
- 3-5 hours
- 1-2 hours

Time Elapsed (per level): • 1-5 days

- 1-2 hours
- 3-5 hours/patent
- 1-2 hours/trademark
- 1 hour/copyright

Time Elapsed (total): • <1 week

- 1-5 days
- 1-5 days/patent
- 1-5 days/trademark
- 1-5 days/copyright
- 2-2.5 years/patent
- 20 years/patent
- 5-10 years/trademark
- 10 years/copyright

Note: Trade secrets need not be registered, but reasonable steps must be taken to keep secret, including proper markings and use of Non-Disclosure Agreements.

IP Protection Activities:

- Internal awareness and education
- Internal relationship building
- Identify protection opportunities
- Identify type of protection(s) needed
- Catalog and qualify opportunities
- Notification to IP Marketing
- IP Protection team member assigned
- Further educate innovation generator on information needed for IP protection
- Assist innovation generator in getting innovation to point for protection with IP
- Assist IP Marketing with technical understanding
- Disclosure form received
- Clearance Searches
- Assess disclosure form
- Notification to IP Protection legal
- Verify disclosure award received (if any)
- Follow up with innovation generator and legal
- Application filed
- Verify filing award received (if any)
- Assist innovation generator with issues relating to using innovation while IP protection pending
- Follow up with legal regarding status
- Review written documents from government agency where application filed & assist in response
- Assist in notification to innovation generator
- Assist innovation generator in marking innovation with registration information
- Assist innovation generator in understanding extent of IP protection
- Verify registration
- Verify issuance award received (if any)
- Record all relevant IP information
- Internal follow up
- IP policing

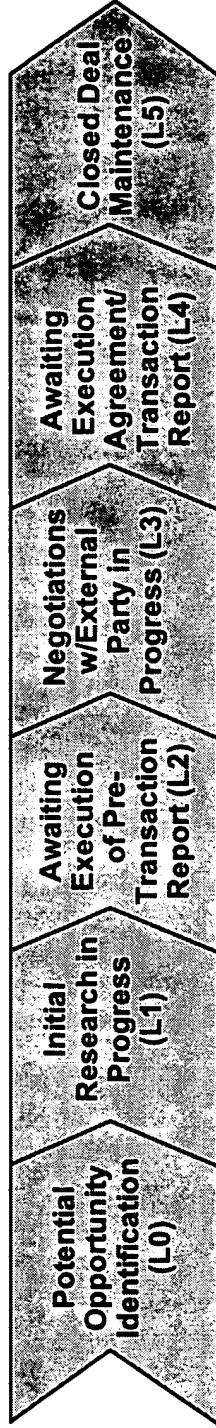
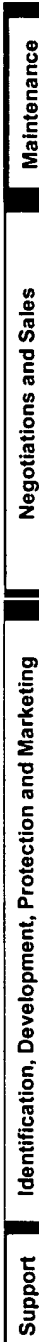
Measures:

- Innovations identified (#/types)
- Quality of innovations
- # Disclosures
- Innovation attributes known and cataloged
- # Applications filed
- Quality of applications
- Proper innovation usage during IP
- Pendancy
- # Registration
- Proper markings
- IP attributes cataloged

FIG. 2

IP Marketing Life Cycle

Continuous IP Process:



Effort Spent:

Time Elapsed (per level):

Time Elapsed (total):

IP Marketing Activities:

- 1-5 days
- 1-2 hours/product
- <1 week
- Internal awareness and education
- Internal relationship building
- Identify potential marketing opportunities
- Catalog and quality potential opportunities
- Notification to IP Protection for disclosure
- IP Marketing team member assigned
- 7-10 days
- 5-10 hours/product
- 1-2 weeks
- Begin market research
- Follow-up interview with SME
- Begin product scorecard research
- Assess competitive environment
- Initial valuation of product
- Prioritize product within portfolio
- Make Go-No Go decision
- Begin to get internal buy-in
- Draft & submit PTR
- 7-10 days
- 5-10 hours/deal
- 2-3 weeks
- Conduct in-depth interview with SME & continue to build relationship
- Begin channel strategy
- Continue competitive research and valuation of product
- Initiate contact with chosen sales partners/end users
- Utilize NDAs
- Protect IP prior to disclosing (when possible)
- 1-5 months
- 10-50 hours/deal
- 2-6 months
- Continue product valuation, market research, & channel strategy
- Create product overview presentation (external)
- Determine structure & pricing of deal
- Begin and complete negotiations / contracts
- Draft & submit Transaction Report
- 7-10 days
- 1-2 hours/deal
- 2-6 months
- Finalize fine points of contract
- Manage technical and logistic issues of product
- Sign contracts
- Record all relevant product information
- Record all relevant deal information
- Track royalties
- Sales partner / end user relationship management
- Internal follow up
- Quality standards management
- IP policing
- 1 day + ongoing
- 1-2 hours/deal +
- 2-6 months

Measures:

- Products identified
- Quality of products
- Product attributes known & cataloged
- PTR for all deals
- Accuracy of valuations
- Terms of deals
- # times contract reworked
- TR for all deals
- Revenues
- % licensed with patent protection
- Deal attributes cataloged

FIG. 3

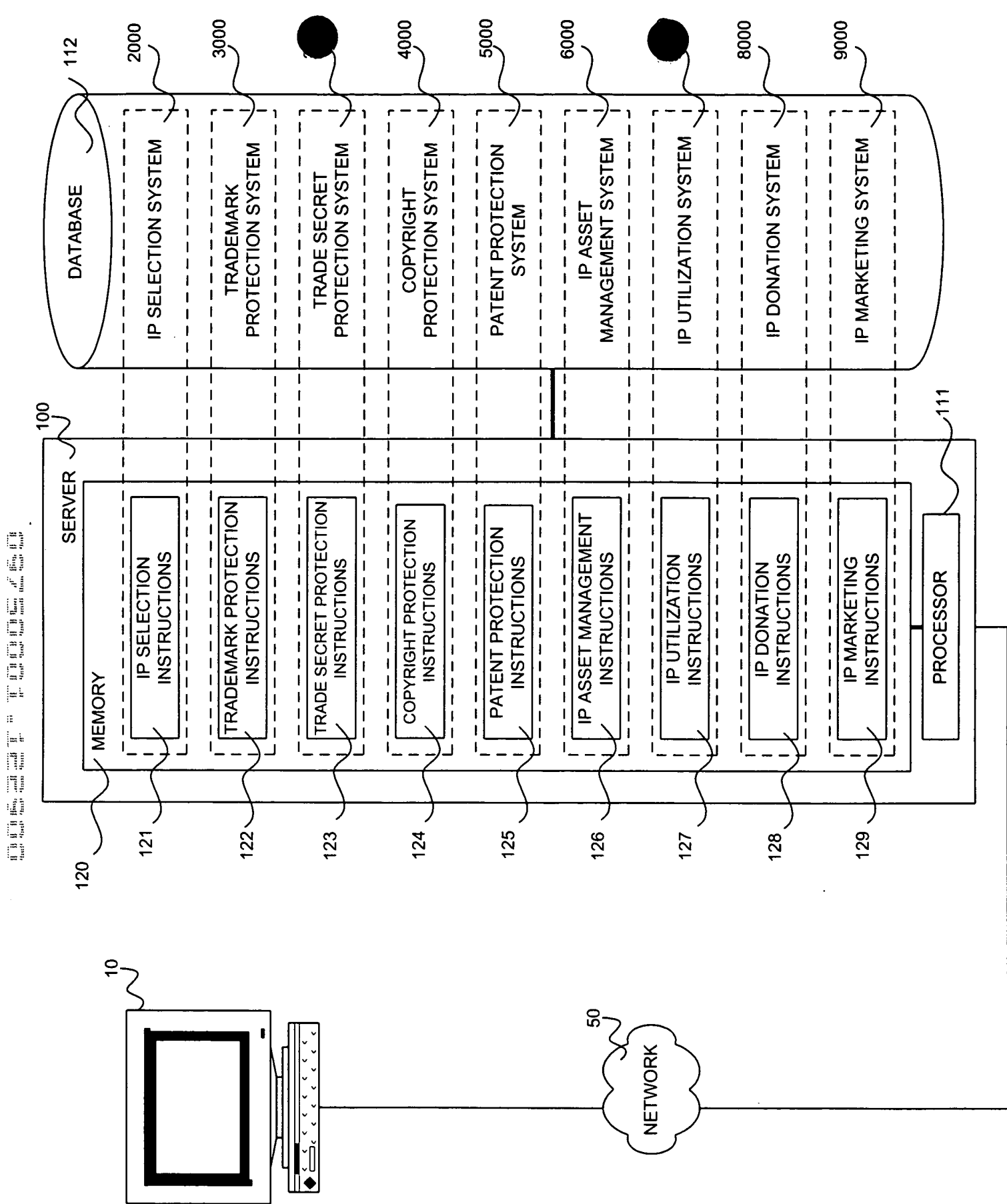


FIG. 4

11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60 61 62 63 64 65 66 67 68 69 70 71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 100

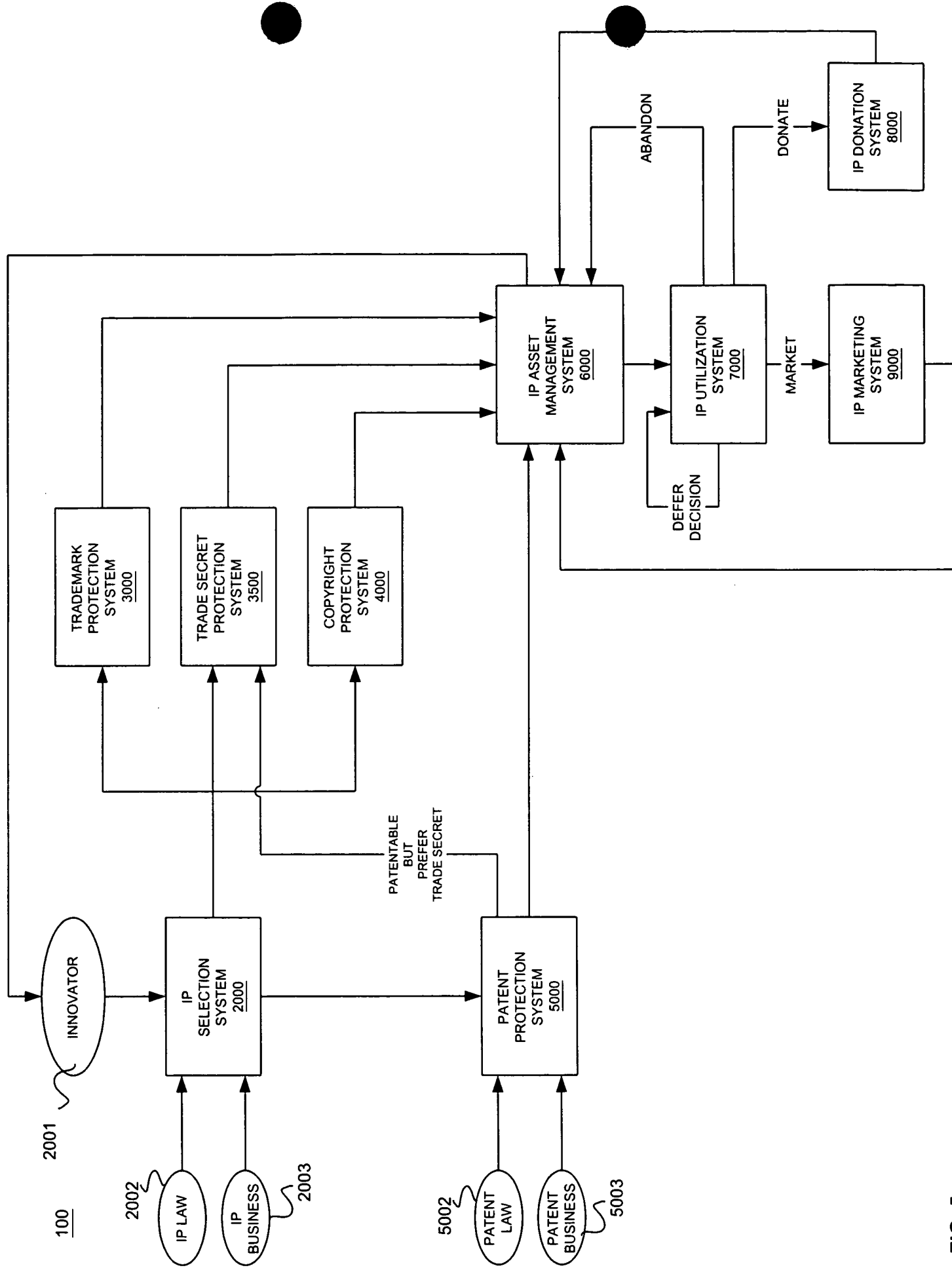


FIG. 5

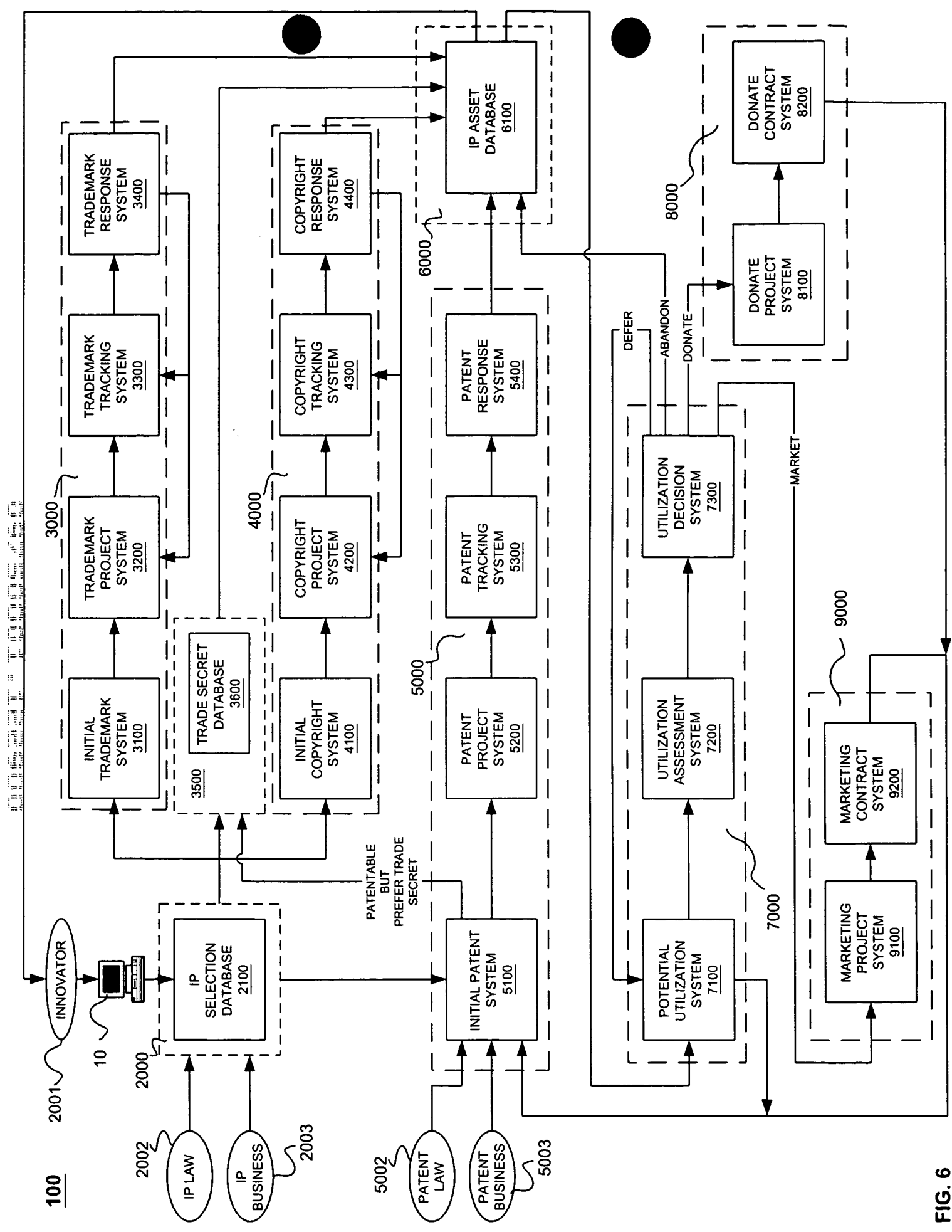
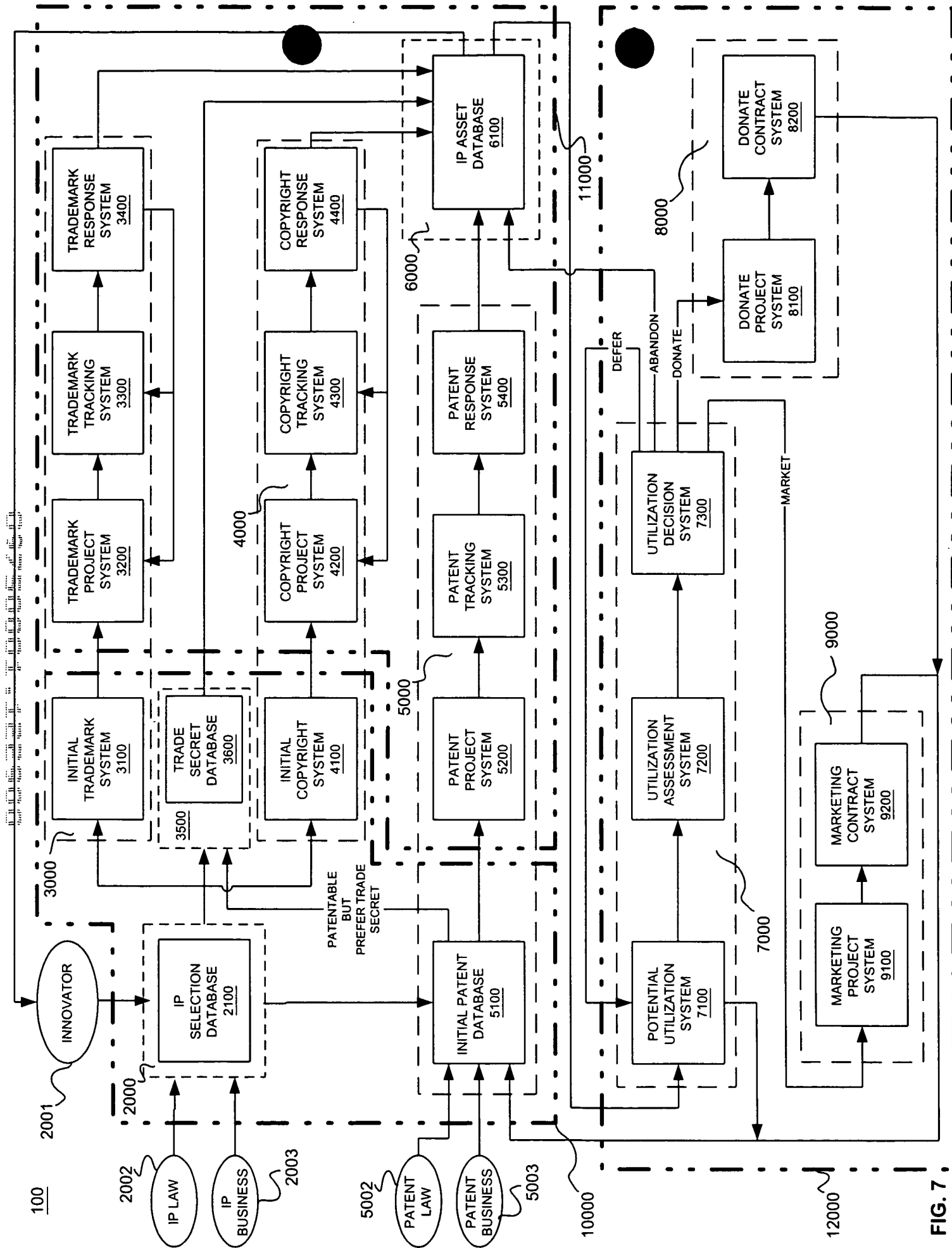
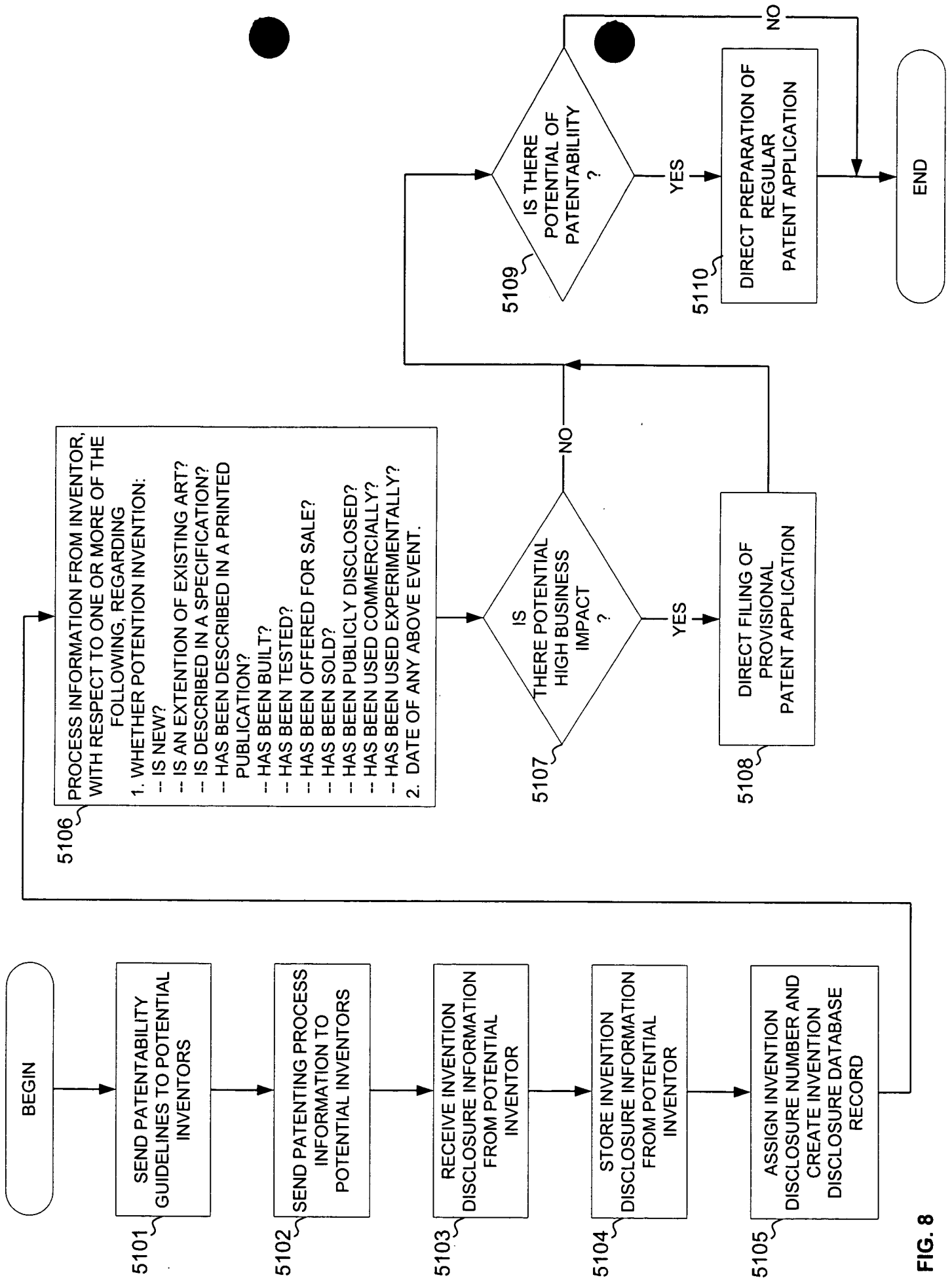


FIG. 6





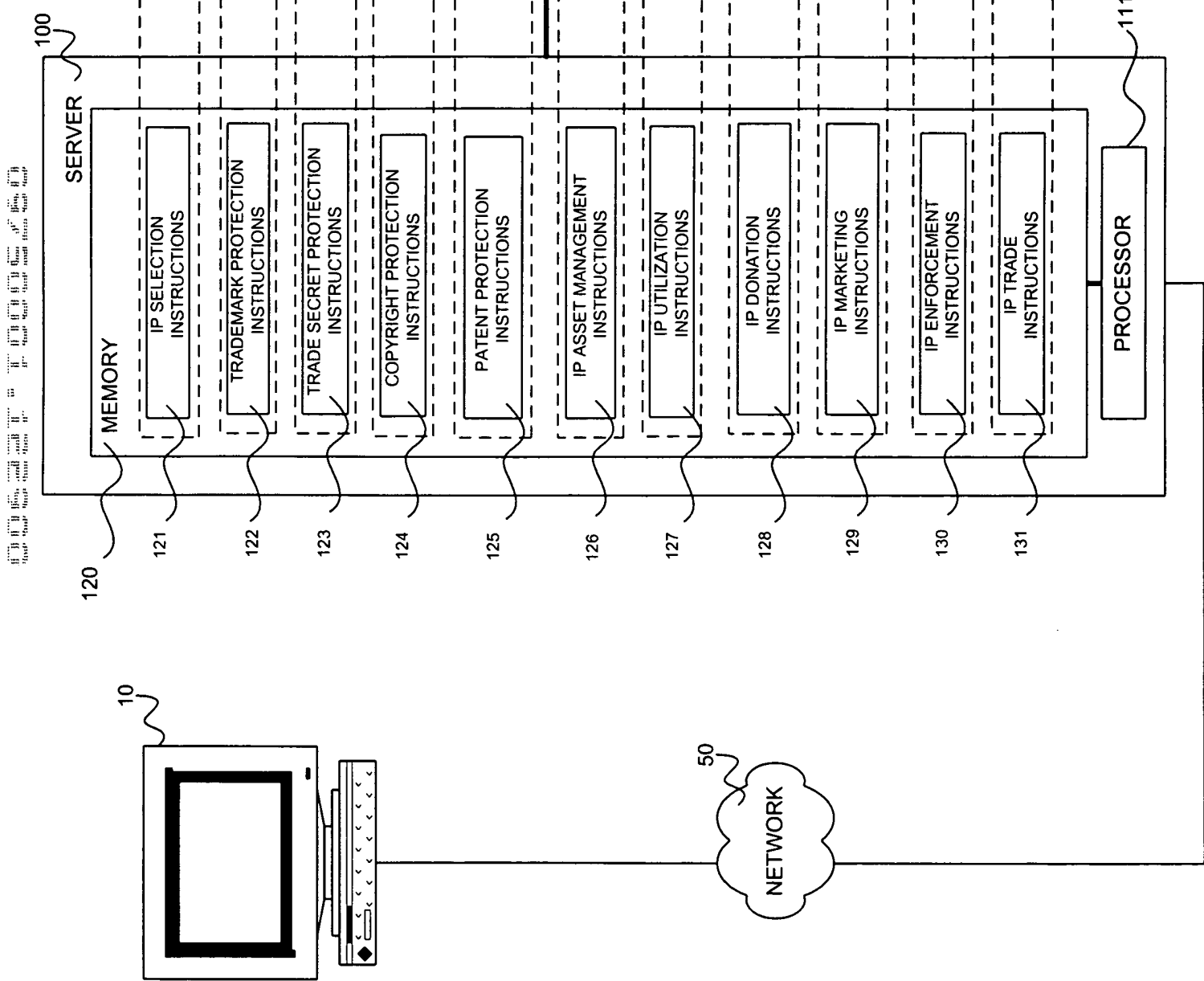
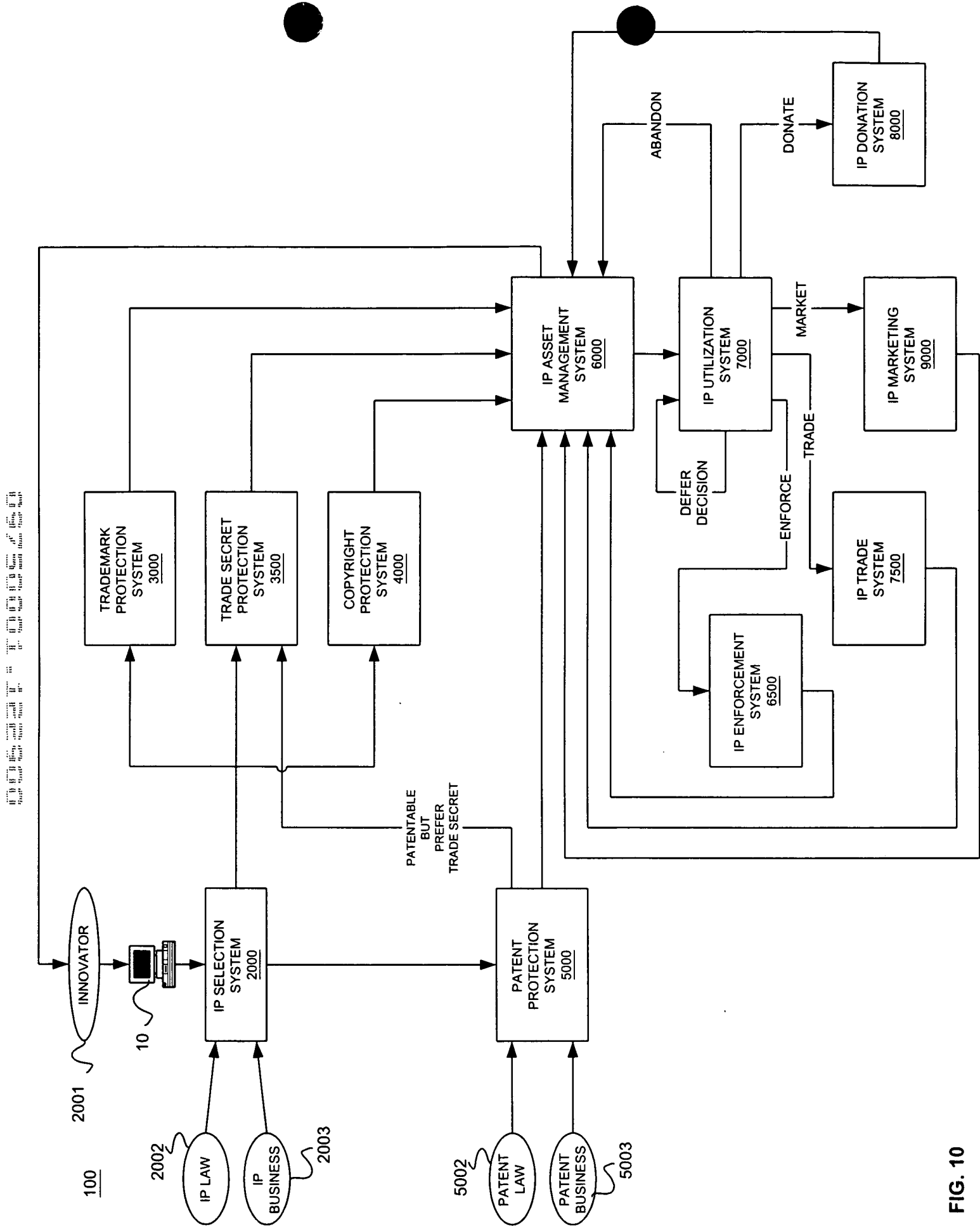


FIG. 9



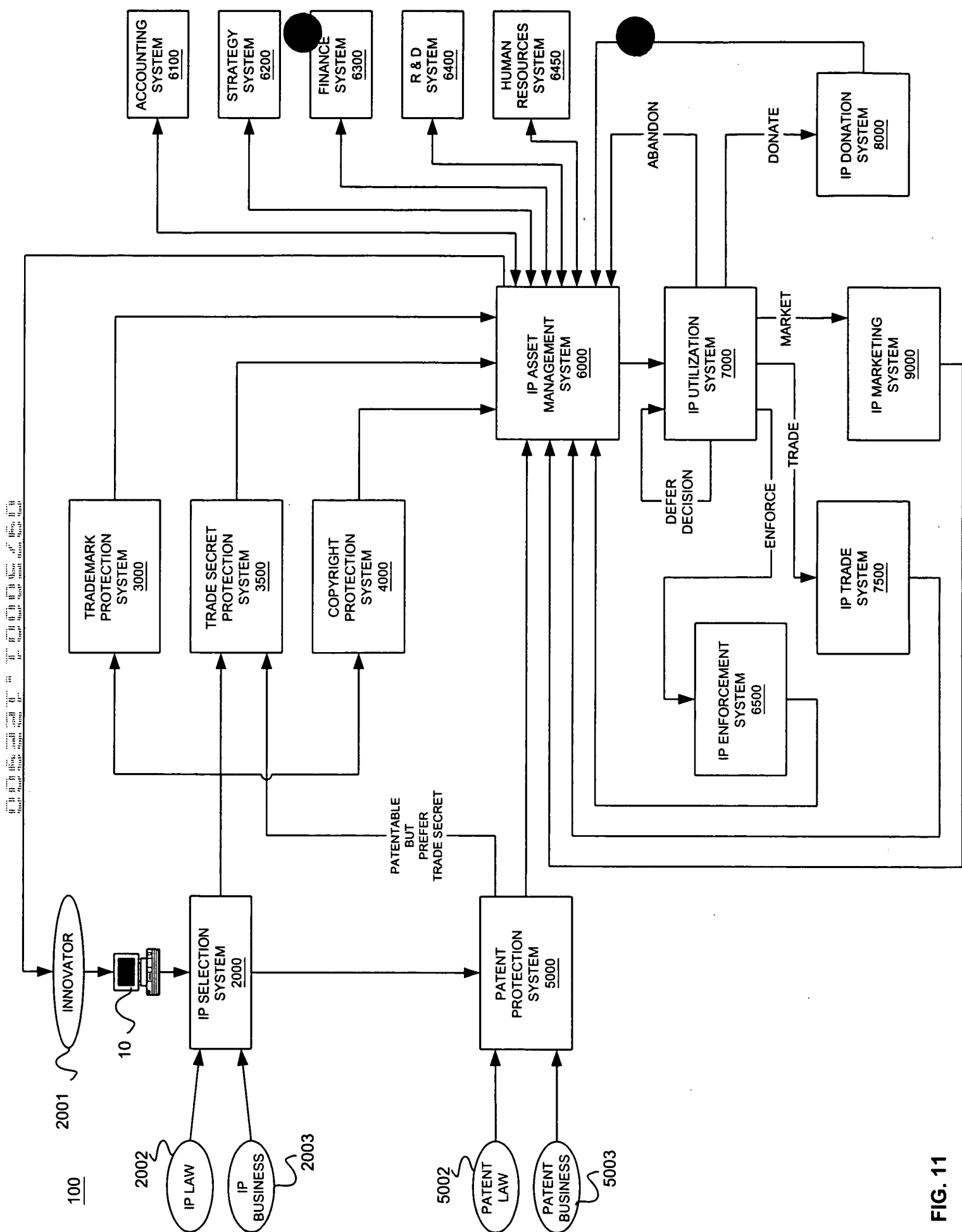


FIG. 11

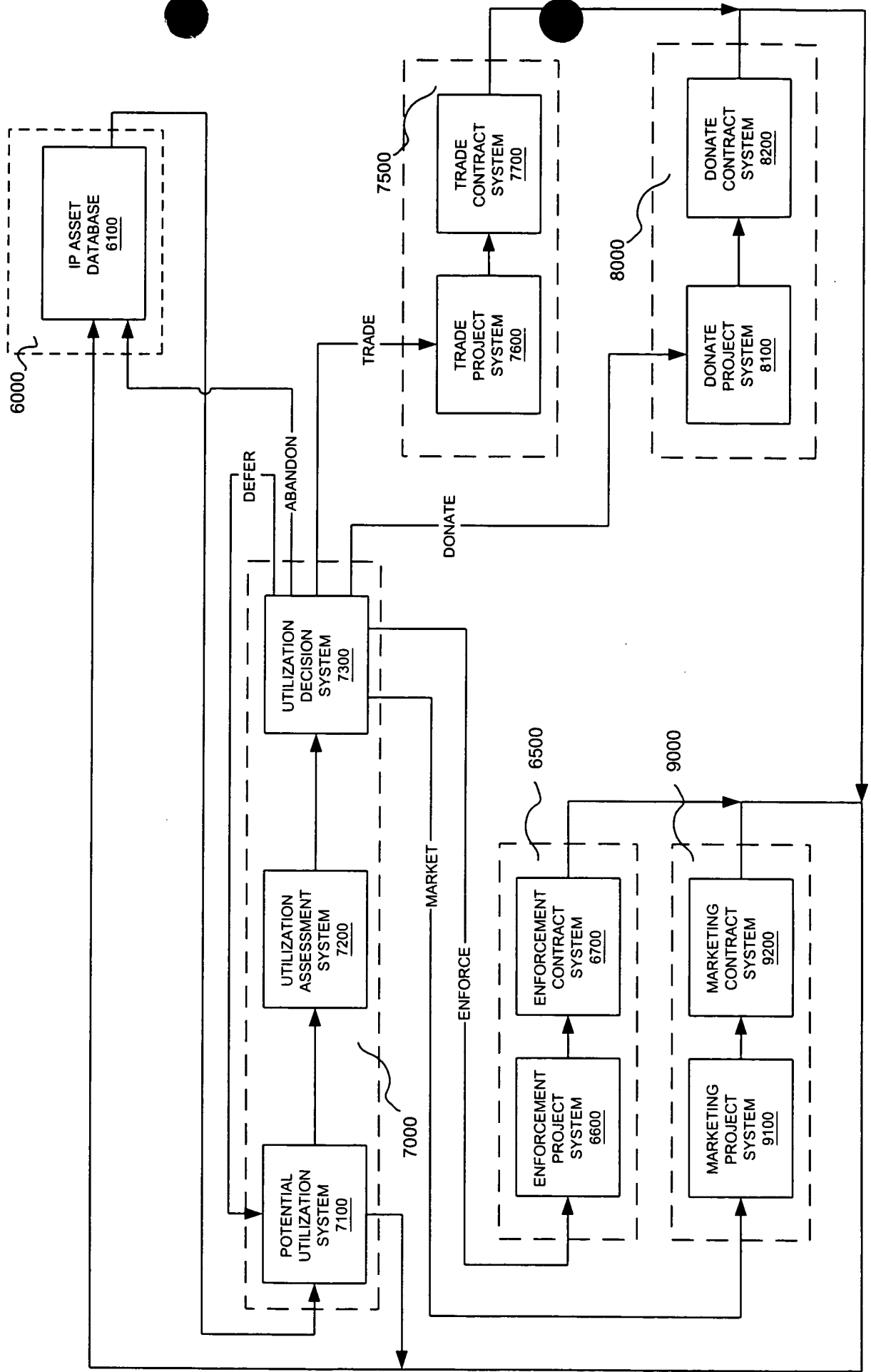


FIG. 12

FIG. 13 is a block diagram of a system architecture. The system includes an IP ASSET MANAGEMENT SYSTEM 6000, an ACCOUNTING SYSTEM 6100, and a STRATEGY SYSTEM 6200. The IP ASSET MANAGEMENT SYSTEM 6000 is connected to the ACCOUNTING SYSTEM 6100 and the STRATEGY SYSTEM 6200. The ACCOUNTING SYSTEM 6100 includes a REVENUES SYSTEM 6110 and an EXPENSE SYSTEM 6120. The STRATEGY SYSTEM 6200 includes a CORE BUSINESS SYSTEM 6210 and a CROWN JEWELS SYSTEM 6220.

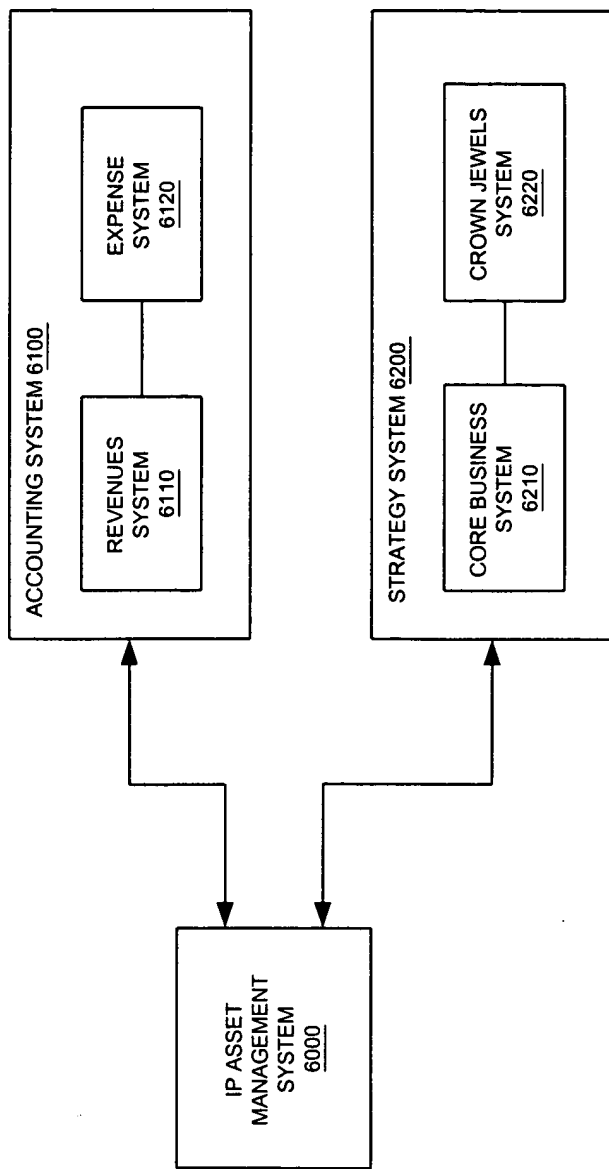


FIG. 13

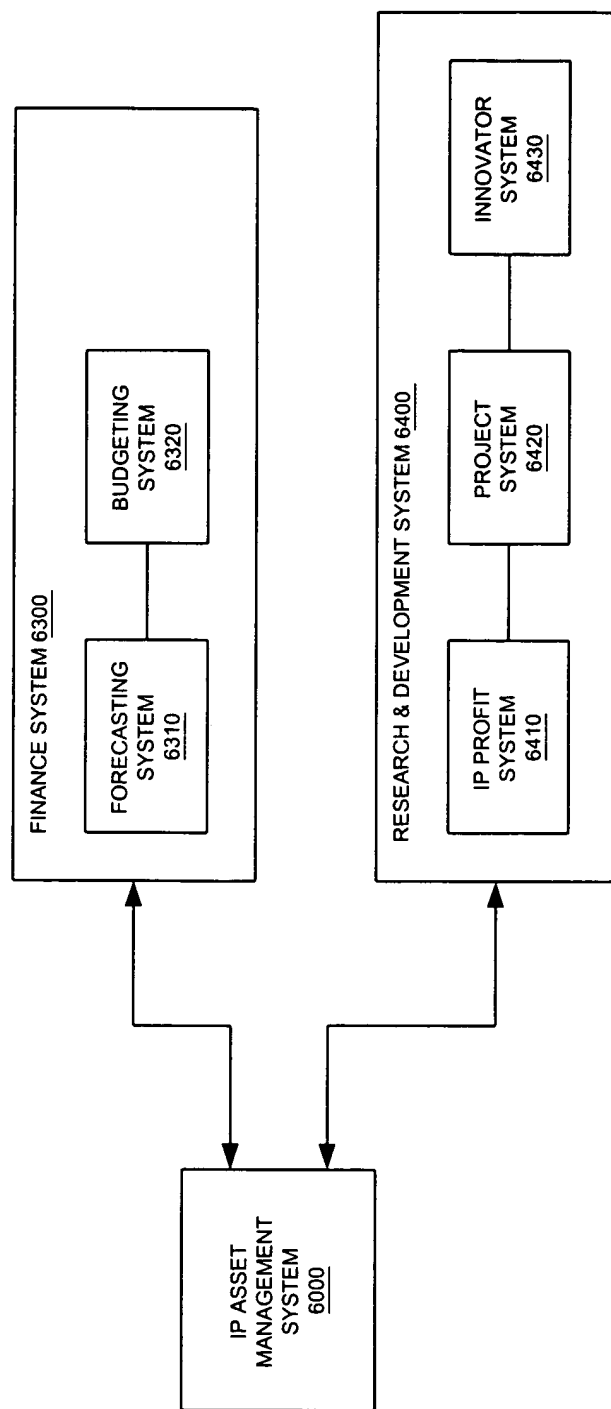


FIG. 14

	PRODUCT	B/U	LEAD	L1	L2	L3	L4	L5	L6	L7	L8	L9	L10	GOAL	\$	%
1	PRODA	BUB	X						42					2001	3.5M	0.5
2	PRODB	BUC	Z										45	4Q 00	1M	0.9
3	PRODC	BUA	Z				35							4Q 00	3.5M	0.25
4	PRODD	BUA	Y					35						4Q 00	3.5M+	0.5
5	PRODE	BUD	X					35						4Q 00	3.5M	0.05
6	PRODF	BUE	W					35								
7	PRODG	BUD	W		35											
8	PRODH	BUC	X					35						2001	500K	
9	PRODI	BUE	Z						35					2001		
10	PRODJ	BUE	X					40						2001	5M	0.33
11	PRODK	BUB	W								47			2001	6M	0.9
12	PRODL	BUD	Y	31X										-----	-----	-----
13	PRODM	BUB	Y					35								
14	PRODN	BUA	W				38							2001		
15	PRODO	BUC	Y	36X										-----	-----	-----
				INITIAL RESEARCH	MARKET RESEARCH	PTR APPROVAL	MARKET PLAN	SELL	NEGOTIATE	TR APPROVAL	EXECUTE CONTRACT	SETUP CONTRACT	AUDIT CONTRACT			

FIG. 15

FIG. 18 is a flowchart illustrating a process for identifying and scoring product opportunities. The process begins with a 'BEGIN' terminal, followed by a sequence of steps: 'RECEIVE AND STORE PRODUCT IDENTIFICATION' (9501), 'RECEIVE AND STORE BUSINESS UNIT IDENTIFICATION' (9502), 'RECEIVE AND STORE LEAD PERSONNEL IDENTIFICATION' (9503), 'RECEIVE AND STORE PRODUCT OPPORTUNITY SCORE' (9504), and 'RECEIVE AND STORE LEVEL IDENTIFICATION' (9505). After step 9505, the process flows to step 9506, 'RECEIVE AND STORE COMPLETION DATE GOAL DATA', followed by 'RECEIVE AND STORE OPPORTUNITY AMOUNT DATA' (9507), 'RECEIVE AND STORE PROJECT COMPLETION PERCENT DATA' (9508), and 'UPDATE PRODUCT OPPORTUNITY SCORING PIPELINE' (9509). The process concludes with an 'END' terminal.

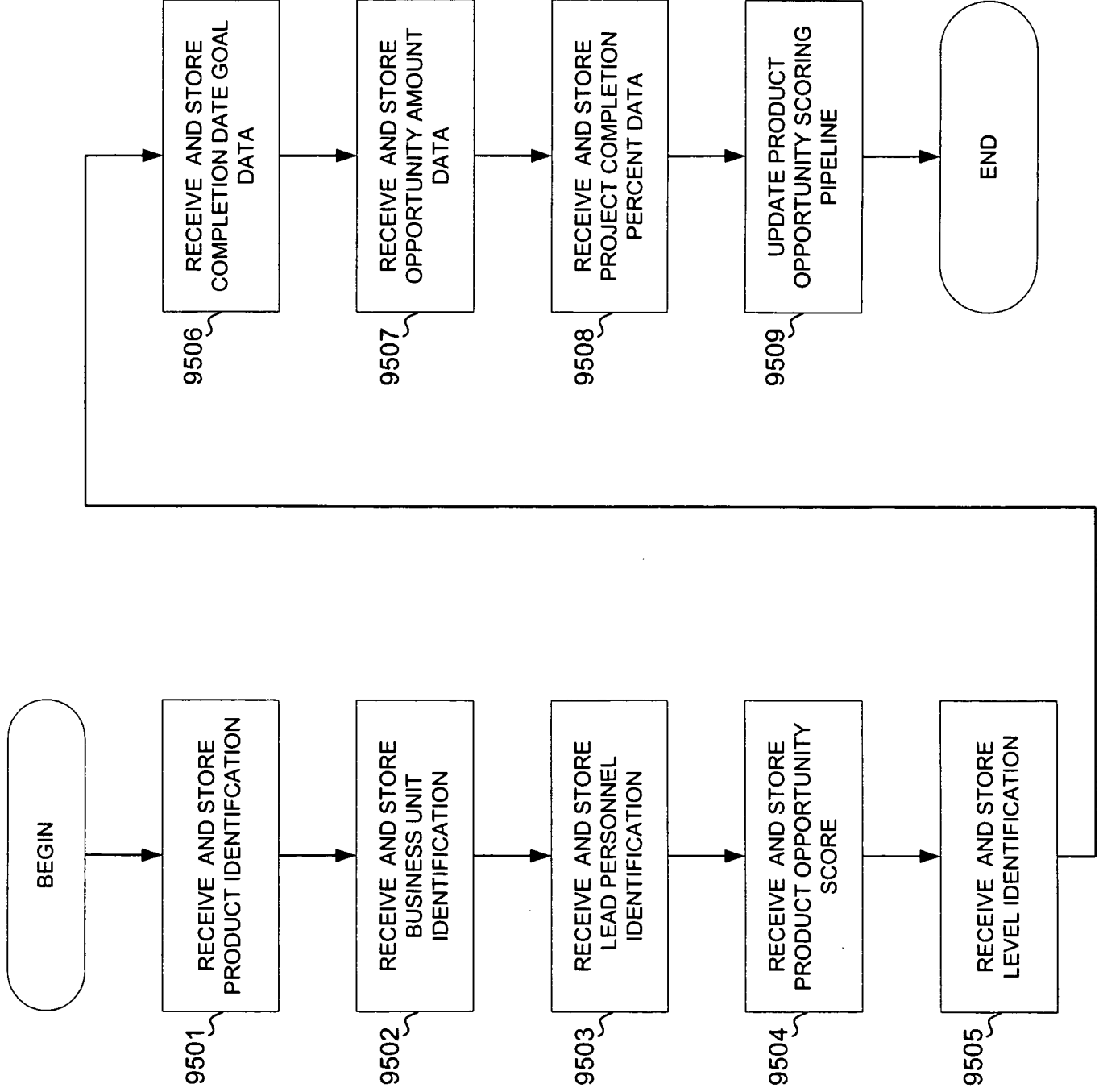


FIG. 18

FIG. 19 is a flowchart illustrating a process for product opportunity scoring. The process begins with a BEGIN terminal, followed by a process block 9521: RECEIVE PRODUCT OPPORTUNITY SCORING PIPELINE VIEW INSTRUCTION. This is followed by process block 9522: DETERMINE SORT CRITERIA BASED ON RECEIVED PRODUCT OPPORTUNITY SCORING PIPELINE VIEW CRITERIA. Next is process block 9523: SORT PRODUCT OPPORTUNITY SCORING PIPELINE RECORDS BASED ON SORT CRITERIA. This is followed by process block 9524: SEND PRODUCT OPPORTUNITY SCORING PIPELINE DATA. The process concludes with an END terminal.

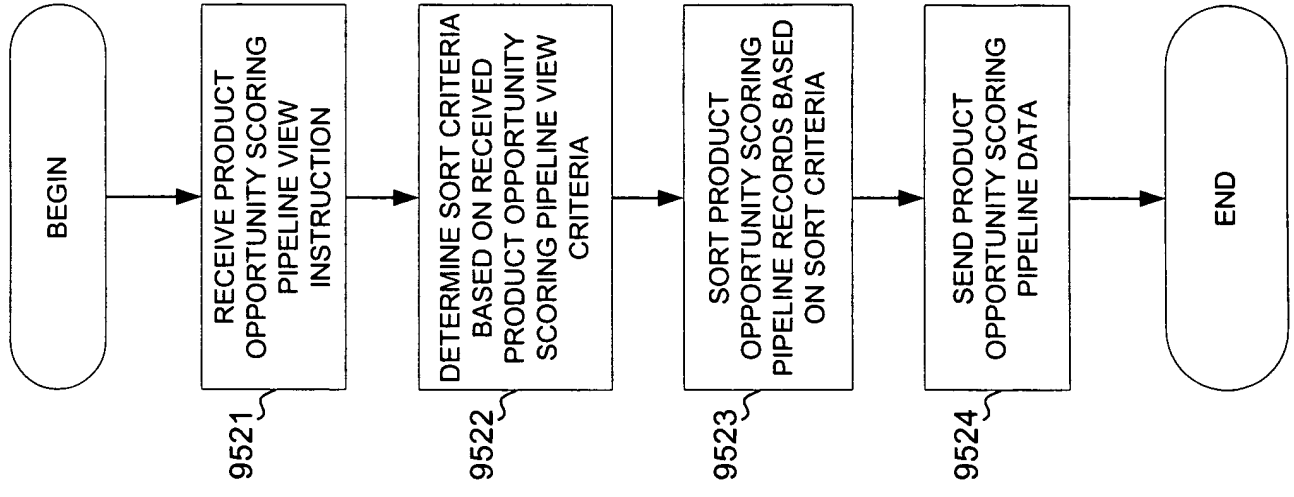


FIG. 19

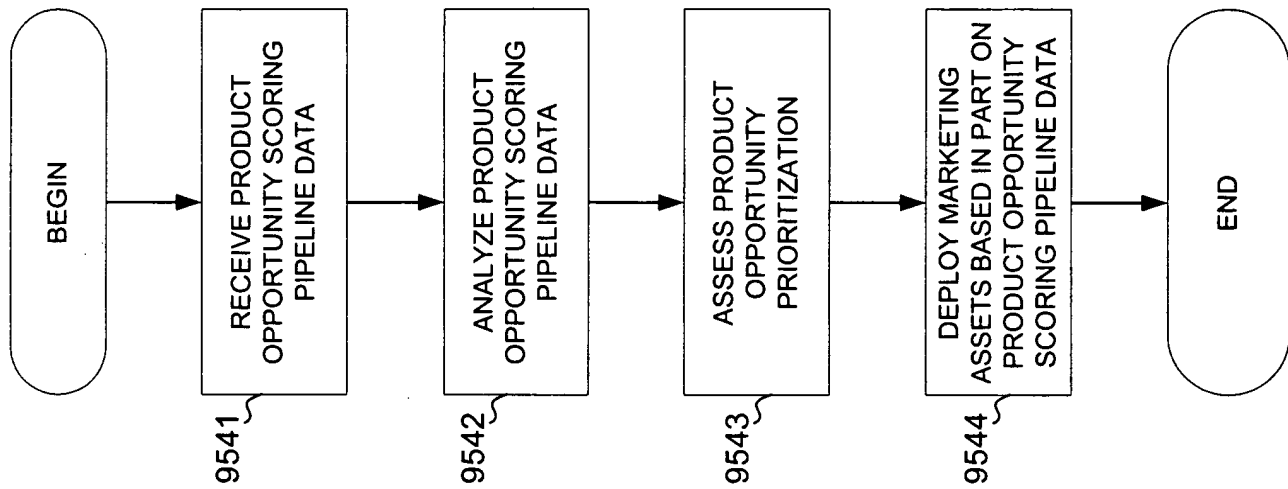


FIG. 20

Intellectual Property Development, Marketing and Maintenance Database System

IP Marketing Database - Tables

Table	Description
Companies	Table of companies
Marketing Opps	Table of IP marketing opportunities

IP Marketing Database - Companies Table

Field Name	Data Type	Description
Formal Name	Text	Mailstop

IP Marketing Database - Marketing Opps Table

Field Name	Data Type	Description
Opp #	AutoNumber	
Status	Text	
Estimated Mktg Date	Date/Time	
Product/Project Name	Text	
Product Group	Text	
Product Type	Text	
Type of IP Involved	Text	
BellSouth Entity	Text	
BellSouth Contacts	Memo	
BIPMAN Contact1	Text	
BIPMAN Contact2	Text	
BIPMAN Contact3	Text	
BIPMAN Contact4	Text	
Mktg Participant Name	Text	
Mktg Participant Address1	Text	
Mktg Participant Address2	Text	
Mktg Participant City, State,	Text	
Mktg Participant Contacts	Memo	
Mktg Participant Type	Text	
Deal Size	Text	
Estimated Deal Range	Text	
Estimated Deal Value	Text	
Priority	Text	
Description of Opportunity	Memo	
Background of Deal	Memo	
Financial Analysis	Memo	
Competitive Analysis	Memo	
Status of Deal	Memo	
Anticipated Timelines	Memo	
Pre-Trans Approval Person	Text	
Pre-Trans BellSouth Co	Text	
Title of Pre-Trans Approver	Text	
Date Pre-Trans Approved	Date/Time	
Final Bus Approval Person	Text	
Final Bus Approver's BellSouth	Text	
Title of Final Bus Approver	Text	
Date Final Bus Approved	Date/Time	
Final Legal Approval Person	Text	
Final legal Approver's BellSouth	Text	
Title of Legal Bus Approver	Text	

FIG. 21

Date Legal Bus Approved	Date/Time	
Follow-Up Date	Date/Time	
Follow-Up Needed	Memo	
Patent Status	Text	
IT Platform	Memo	
Level 1 Date	Date/Time	
Level 2 Date	Date/Time	
Level 3 Date	Date/Time	
Level 4 Date	Date/Time	
Level 5 Date	Date/Time	
Sub-entity	Text	
Top25	Yes/No	
IP Marketing Database - Queries		
Queries		Description
CoAlphaSort		
Level 0 WIP Report		
Level 1 WIP Report		
Level 2 WIP Report		
Level 3 WIP Report		
Level 4 WIP Report		
Level 5 WIP Report		
Marketing Opps Query		
Most Recent New Deals		
Opportunity Summaries - Specify 1 Entity Only		
Report by Entity-Specify 1 Entity Only		
Top 25 Report		
IP Marketing Database - Forms		
Forms		Description
Marketing Opps		
IP Marketing Database - Reports		
Reports		Description
Deal Overview by Vendor		
Level 0 WIP Report		
Level 1 WIP Report		
Level 2 WIP Report		
Level 3 WIP Report		
Level 4 WIP Report		
Level 5 WIP Report		
Most Recent New Deals		
Opportunity Summaries - ALL		
Opportunity Summaries - Specify 1 Entity Only		
Report by Entity - All		
Report by Entity-Specify 1 Entity Only		
Sales Funnel by Status		
Sales Funnel Tracking by Date		
Top Deals Report		

FIG. 22

Contract Tracking Database - Tables		
Tables		Description
Agreement Types		
Companies		
Contracts Listing		
Contract Tracking Database - Agreement Types Table		
Field Name	Data Type	Description
ID	AutoNumber	
Agreement Type	Text	
Description	Memo	
Contract Tracking Database - Companies Table		
Field Name	Data Type	Description
ID	AutoNumber	
Field1	Text	Company names
Contract Tracking Database - Contracts Listing Table		
Field Name	Data Type	Description
ID	AutoNumber	
First Pary	Text	
Second Party	Text	
Third Party	Text	
Effective Date	Date/Time	
Termination or Renewal Date	Date/Time	
Termination/Renewal Terms	Memo	
Confidentiality Period?	Text	
Executed Copy on File?	Text	
Location of Original	Text	
Additional Comments	Memo	
Agreement Type	Text	
Executed Contract Image	Hyperlink	Link to scanned image of signed original agreement
Other Document Image	Hyperlink	Link to scanned image of signed original agreement
Transaction Report Image	Hyperlink	Link to scanned image of signed original agreement
Affiliate Involved	Text	
Transaction Type	Text	
Types of IP Involved	Text	
Frequency of Payment	Text	
Payment/Royalty Due Date	Date/Time	
Additional Payment Terms	Text	
Amount Due	Text	
1999 YTD Payments	Currency	
2000 YTD Payments	Currency	
2001 YTD Payments	Currency	
2002 YTD Payments	Currency	
2003 YTD Payments	Currency	
IPTYPE 1	Text	
IPTYPE 2	Text	
IPTYPE 3	Text	
IPTYPE 4	Text	
IPTYPE 5	Text	
Project Name	Text	
Contract Tracking Database - Queries		
Queries		Description

FIG. 23

Company Alpha Order		
Unexecuted Agreements		
Contract Tracking Database - Forms		
Forms		Description
Contracts Listing		
Contract Tracking Database - Reports		
Reports		Description
Unexecuted Agreements		

FIG. 24

FIG. 24

Innovation Awards Database - Tables

Tables		Description
Awards		
Company Addresses		
ESP Coordinators		
IP Coordinators		

Innovation Awards Database - Awards Table

Field Name	Data Type	Description
Key #	AutoNumber	Unique Key
Award #	Text	Award ID#
LegalCaseNo	Text	Legal Dept. Case No.
Greeting	Text	Mr., Ms., Dr. etc.
FullName	Text	Recipient's Full Name
CompanyName	Text	Company Name
BusAdr1	Text	Mailstop
BusAdr2	Text	Street Address
City	Text	City
State	Text	State
ZipCode	Text	Zip
Phone#	Text	Business Phone
FAX#	Text	Business FAX
IP ID#	Text	Name of IP Coordinator
SupvGreetings	Text	Mr., Ms., Dr. etc.
SupervisorName	Text	Supervisor's Name
SupvBusAdr1	Text	Supervisor's Mailstop
SupvBusAdr2	Text	Supervisor's Street Address
SupvCity	Text	Supervisor's City
SupvState	Text	Supervisor's State
SupvZipCode	Text	Supervisor's Zip
DHGreeting	Text	Mr., Ms., Dr. etc.
DeptHead	Text	Name of Department Head
DHBusAdr1	Text	Department Head Mailstop
DHBusAdr2	Text	Department Head Street Address
DGCity	Text	Department Head City
DHState	Text	Department Head State
DHZipCode	Text	Department Head Zip
Disclosure Received by Legal	Text	Date Disclosure Received by Legal
Disclosure Received by BIPMAN	Text	Date Disclosure Received by BIPMAN
Letter & Gift Sent to Inventor	Date/Time	Date Letter & Gift Sent to Inventor
Date Application Filed	Date/Time	Date Application Filed
Date BIPMAN Notified of Filing	Date/Time	Date BIPMAN Notified by Legal
Filing Award Request sent to IPC	Date/Time	Date Payment Request Sent to IP Coordinator
Filing Awd Payment Conf Rec'd	Date/Time	Confirmation of Payment to Inventors Rec'd
Filing Award Recognized at Luncheon	Date/Time	Date Award was Recognized at Inn. Awds. Banquet
Date Application Issued	Date/Time	Date Application Issued
US Patent Number	Text	US Patent Number
Date BIPMAN Notified of Filing	Date/Time	Date BIPMAN Notified by Legal
Issuance Award Request sent to IPC	Date/Time	Date Payment Request Sent to IP Coordinator
Iss Awd Payment Conf Rec'd	Date/Time	Confirmation of Payment to Inventors Rec'd
Iss Award Recognized at Luncheon	Date/Time	Date Award was Recognized at Inn. Awds. Banquet
Date 5th Patent Issued	Date/Time	Date Application Issued
US Patent Numbers	Text	US PATENT Numbers for 5 Issued Patents

FIG. 25

Date BIPMAN Notified of Inv Ach Awd	Date/Time	Date BIPMAN Notified by Legal
Inv Ach Award Request sent to IPC	Date/Time	Date Payment Request Sent to IP Coordinator
Inv Ach Awd Payment Conf Rec'd	Date/Time	Confirmation of Payment to Inventors Rec'd
Inv Ach Award Recongnized at Luncheon	Date/Time	Date Award was Recognized at Inn. Awds. Banquet
Date General Award Appl Rec'd	Date/Time	Date Application Filed
General Award Request sent to IPC	Date/Time	Date Payment Request Sent to IP Coordinator
General Awd Payment Conf Rec'd	Date/Time	Confirmation of Payment to Inventors Rec'd
General Award Recognized at Luncheon	Date/Time	Date Award was Recongnized at Inn. Awds. Banquet
Date Article Published	Date/Time	Date Application Filed
Date BIPMAN Notified of Publication	Date/Time	Date BIPMAN Notified by Legal
Rec'd Request for Release Form	Date/Time	Req. for Release Form Rec'd
Publication Award Request sent to IPC	Date/Time	Date Payment Reuquest Sent to IP Coordinator
Confirmation of Payment Red'd	Date/Time	Confirmation of Payment to Inventors Rec'd
Publ Award Recoongized at Luncheon	Date/Time	Date Award was Recongnized at Inn. Awds. Banquet
General Notes	Memo	Comments
Award Type	Text	Type of Award
Gift Received	Text	Gift Sent to Inventor
Disclosure Title	Memo	Title of Patent Disclosure
Application Title	Memo	Title of Patent Application
Patent Title	Memo	Title of Issued Patent
Publication Title	Memo	Title of Published Artcle
General Award Title	Memo	Reason for General Award
\$ Amount of General Award	Text	\$ Amount of General Award
BellSouth Employee	Text	Still with BellSouth?
DHTitle	Text	Department Head's Title
BSCC ESP Disclosure	Text	Designates if disclosure was rec'd thru BSCC ESP Program
ESP Coordinator	Text	ESP Coordinator's Name

Innovation Awards Database - Company Addresses Table

Field Name	Data Type	Description
CompanyName	Text	Company Name
FormalName	Text	Mailstop
BusAdr2	Text	Street Address
City	Text	City
State	Text	State
ZipCode	Text	Zip

Innovation Awards Database - ESP Coordinators Table

Field Name	Data Type	Description
ESP Coordinators	Text	
Company	Text	
Market	Text	
Department	Text	
State/Region	Text	
Phone	Text	
Fax	Text	
Street Address 1	Text	
Street Address 2	Text	
City	Text	
State	Text	
ZipCode	Number	
Mail Code	Text	

FIG. 26

Innovation Awards Database - IP Coordinators Table		
Field Name	Data Type	Description
IP ID#	Text	IP Coordinator ID#
FullNameIPC	Text	Coordinator's Full Name
Title	Text	Mr., Ms., Dr., etc.
CompanyName	Text	Company Name
BusAdr1	Text	Mailstop
BusAdr2	Text	Street Address
City	Text	City
State	Text	State
ZipCode	Text	Zip
Phone#	Text	Business Phone
FAX#	Text	Business FAX
Innovation Awards Database - Queries		
Queries		Description
Awards Query		
By Date & IPC - Apps Filed		
By Date & IPC - Disclosures Filed		
By Date & IPC - Patents Granted		
By Date & IPC - Apps Filed		
Certificates for Publication Awards		
Certificates for Recipients of Filing Awards		
Certificates for Recipients of Issuance Awards		
Company Order		
DH Mailing Labels - Filing Awards		
DH Mailing Labels - Inv Ach Awards		
DH Mailing Labels - Issuance Awards		
DH Mailing Labels - Publication Awards		
DH of Recipients of Filing Awards		
DH of Recipients of Inventor Ach Awards		
DH of Recipients of Issuance Awards		
DH of Recipients of Publication Awards		
Disclosure Award Letter		
Disclosure Award Letter Query		
Disclosure Gift Check		
General Award		
Inventor Achievement Award		
Inventor Mailing Labels - Filing Awards		
Inventor Mailing Labels - Inv Ach Awards		
Inventor Mailing Labels - Issuance Awards		
Inventor Mailing Labels - Publication Awards		
Issuance Award Winner Check		
Open Filing Awards		
Open General Awards		
Open Inventor Achievement Awards		
Open Issuance Awards		
Open Publications Awards		
Patent Filing Award		
Patent Issuance Award		
Progress Report		
Publications Award		
Recipients of Filing Awards		

FIG. 27

Recipients of Inventor Achievement Awards		
Recipients of Issuance Awards		
Recipients of Publication		
Innovation Awards Database - Forms		
Forms		Description
Awards		
Company Addresses		
ESP Coordinators		
IP Coordinators		
Innovation Awards Database - Reports		
Forms		Description
Awards		
By Date and IPC - Apps Filed		
By Date and IPC - Disclosures Filed		
By Date and IPC - Patents Granted		
Copy of Recipients of Issuance Awards - Report for Award Mfg		
DH of Recipients of Filing Awards		
DH of Recipients of Inventor Ach Awards		
DH of Recipients of Issuance Awards		
DH of Recipients of Publications Awards		
Disclosure Award letter		
General Award Form		
Inventor Achievement Award Form - 10 issued		
Inventor Achievement Award Form - 5 issued		
Open Filing Awards		
Open General Awards		
Open Inventor Achievement Awards		
Open Issuance Awards		
Open Publication Awards		
Patent Filing Award Form		
Patent Issuance Award Form		
Progress Report		
Publications Award Form		
Recipients of Filing Awards - Sort by Award #		
Recipients of Filing Awards - Sort by Inventor Name		
Recipients of Inventor Achievement Awards - Sort by Award #		
Recipients of Issuance Awards - Sort by Award #		
Recipients of Issuance Awards - Sort by Inventor Name		
Recipients of Publication Awards - Sort by Award #		
Recipients of Publication Awards - Sort by Inventor Name		
Verification Table		

FIG. 28

BellSouth Intellectual Property Marketing Database			
Status of Opportunity:	L2 - Awaiting Execution Pre-Transaction		Opportunity No. 1
Date Status Changed To:	L1	L2 12/9/98	L3 L4 L5
Product/Project Name:	TechNet		Deal Size: C = LARGE
Product Group:	Network		Deal Priority: A = LOW
Product Type:	Software		Top Deals Rept? <input type="checkbox"/>
Type of IP Involved:	Proprietary Information		Est. \$\$\$ Range:
Patent Status:	Filed		Deal \$\$\$ Value:
BellSouth Entity:	BellSouth Telecommunications, Inc.	BIPMARK Lead:	CB
Sub-entity Name :	Network	BIPMARK Support 1:	
BellSouth Contacts:	Bill Smith	BIPMARK Support 2:	
		BIPMARK Support 3:	
Marketing Participant:	Andersen Consulting (to BT, SBC)	Participant Type:	Remarketing
Address:			Participant Contacts:
City, State, Zip			
Estimated Availability Date:	1/ 1/99		
Description of Opp. :			
Status of Deal:			
Background of Deal:			
IT Platform:			
Financial Analysis:			
Competitive Analysis:			
Comments for Top Deals Report:			
Next Scheduled Follow-Up Date:	1/15/99		
Follow-Up Actions to be Taken:	Check on status of investigation		

FIG. 29

[illegible]

FIG. 30

PRIVATE/PROPRIETARY
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BellSouth Intellectual Property Marketing Corporation
Level 1 (Initial Research in Progress) WIP Report
Date Generated: Tuesday, December 14, 1999

<u>Product/Project Name</u>	<u>Subsidiary Name</u>	<u>Opp #</u>	<u>Patent Status</u>	<u>Company Name</u>	<u>BIPMARK</u> <u>Lead</u> <u>Support</u>	<u>Est. Value</u>	<u>Deal Size</u>	<u>Priority</u>	<u>Date Chgd</u> <u>to L1</u>
-----------------------------	------------------------	--------------	----------------------	---------------------	--	-------------------	------------------	-----------------	----------------------------------

BELLSOUTH

Intellectual Property Companies Contract Tracking Database

Agreement Type:		
First Party:		
Second Party:		
Third Party:		
Effective Date:		Termination or Renewal Date:
Termination or Renewal Terms:		
Confidentiality Period?		
Executed Copy on File?		Location of Original:
Comments:		
View Executed Contract:		
View Other Document:		
<i>For Remarketing Agreements Only:</i>		
Affiliate Involved:		
Transaction Type:		Project Name:
Type of IP Involved:		
View Transaction Report:		
Frequency of Payment:		
Payment/Royalty Due Date:		Amount Due:
Additional Payment Terms:		
YTD Totals:	1999	2000
		2001
		2002
		2003

FIG. 32

Unexecuted Agreements

<u>Agreement Type</u>	<u>First Party</u>	<u>Second Party</u>
-----------------------	--------------------	---------------------

Award #	D99-192	Type	Disclosure Award	Legal Case #	09192	Key #	868
---------	---------	------	------------------	--------------	-------	-------	-----

Inventor Information			
Title	Mr.	Name	Phone No.
			FAX No.
			Still BellSouth employee?
			IP Coordinator ID#
City		State	Zip

Inventor's Supervisor	Inventor's Department Head
Title	Grd
Name	Name
Suite	Title
Address	Suite
City	Address
State	City
Zip	
	State
	Zip

Disclosure Award	Filing Award
Title	Title
Sales Information Storage/Tracking/Notification	
11/11/99 Disclosure Received by Legal	Date Application Filed
11/11/99 Disclosure Received by BIPMAN	Date BIPMAN Notified of Filing
11/16/99 Letter and Gift Sent to Inventor	Filing Award Request Sent to IPC
Gift Sent: Wooden Pen	Filing Award Payment Conf. Rec'd
BSCC-ESP Program: No	Filing Award Recognized at Banquet
Coord Name	

Issuance Award	Publication Award
US Patent Number	Title
	Public Name
Title	
	Date Article Published
Date Patent Issued	Date BIPMAN Notified of Publication
Date BIPMAN Notified of Issuance	Rec'd Request for Release Form
Issuance Award Request Sent to IPC	Publication Award Request Sent to IPC
Issuance Award Payment Conf. Rec'd	Confirmation of Payment Rec'd
Iss. Award Recognized at Banquet	Publ. Award Recognized at Banquet

Inventor Achievement Award	General Award
Patent Nos.	Title
Date Last Patent Issued	\$ Amount of General Award
Date BIPMAN Notified of Inv. Ach. Award	
Inv. Ach. Award Request Sent to IPC	Date General Award Appl. Rec'd
Inv. Ach. Award Payment Conf. Rec'd	General Award Request Sent to IPC
Inv. Ach. Award Recognized at Banquet	General Award Payment Conf. Rec'd
	Gen. Award Recognized at Banquet

General Notes	
---------------	--

Microsoft Access

File Edit View Insert Format Records Tools Window Help

Company Addresses

Company Name	BelSouth Entertainment
Formal Name	BelSouth Entertainment, Inc.
Street Address	1100 Abernathy Road
City	Atlanta
State	GA
Zip Code	30328

Records: 1 of 1

Awards Data

Company Name

FIG. 35











ESP COORDINATORS				
ESP COORDINATOR	JANE DOE			
COMPANY	A - ALL			
MARKET	ALL STATES			
STATE / REGION	ALL STATES / REGS			
PHONE	(404) 555-1212			
FAX	(404) 555-1313			
STREET ADDRESS 1	100 PEACHTREE STREET			
STREET ADDRESS 2	SUITE 4005			
CITY	ATLANTA			
STATE	GA			
ZIP	30309			
MAIL CODE	MC01			
RECORD	   1     of 54			

FIG. 36

Microsoft Access

File Edit View Insert Format Records Tools Window Help

Record: 1 of 2

IP Coordinators

IP ID#	1		
Full Name	Amy Sherwood	Title	Ms.
Company Name	SGS - BetSouth Business Systems, Inc.		
Mailstop	7E01		
Street Address	1155 Peachtree Street, N.E.		
City	Atlanta		
State	GA	Zip Code	30309
Phone#	(404) 249-2738	FAX#	(404) 249-2866

Record: 1 of 2

Awards: Del

IP Coordinator

FIG. 37

Innovation Award Request Patent Filing Award

Date of Request December 8, 1999	BellSouth File No. 98059	Innovation Award No. A99-075
Date Application Filed: Title of Application:		
<p><i>Please arrange payment of a Specific Innovation Award for filing of a patent application for the inventor listed below. Innovation Awards should be grossed up for federal and state taxes. Due to the significance of this contribution to BellSouth, the award should be presented in an appropriate ceremony in the presence of the inventor's peers and/or higher management.</i></p> <p style="text-align: center;"><i>Award Amount:</i></p> <p style="text-align: center;"><i>Approved By: <u> X </u> IP Legal</i> <i>BellSouth IP Management Corp.</i></p>		
Inventor Name	Inventor Signature	
Supervisor Name	Supervisor Signature	
IP Coordinator Name	IP Coordinator Signature	
<p><i>Certification of payment and this signed request form must be returned to:</i></p> <p style="text-align: center;"> Julia Spires, Intellectual Property Administrator 1155 Peachtree Street, NE - Suite 500 - Atlanta, GA 30309 (404) 249-2961 </p>		

PRIVATE/PROPRIETARY/LOCK

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MEMORANDUM

To: John E. Lewis
From: Marcus Delgado
Date: December 8, 1999
RE: Notification of Patent Application Filing for
Title:
BellSouth No.:
Filing Date:

The above-referenced patent application was filed in the U.S. Patent and Trademark Office ("PTO") on the filing date shown above. We expect the official filing receipt, including the assigned serial number for this application, within the next several weeks.

We will keep you advised of further progress as the application proceeds through the PTO.

cc: Donna Post

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Patents Granted 9/1/99 Through 11/30/99

<u>Award</u>	<u>Legal No.</u>	<u>Inventor Name</u>	<u>Company Name</u>	<u>Patent Title</u>	<u>US Patent No.</u>	<u>Date Issued</u>
A99-067	98013	JoAnn Blount (retired)	BSCC - BellSouth Cellular Corp.	Method and System for Automatically Connecting Telephone Calls to Multiple Devices Having Different Directory Numbers (as amended)	5,963,864	10/ 5/99

FIG. 40

Intellectual Property Management Database System

Marketing Table

Field Name	Data Type	Description	Relates (KEY)				Security	Comments
			PK	System generated	Location of Data	Editable		
Project Number	Number	Unique number to keep track of each project				Non-Editable		
Project Name	Character	Name of the project		Free Form Entry		Editable		
Status of Project	Character	Status of the project		Lookup Table		Editable		
Status Date	Date	Anticipated dates for different status levels		Can be system generated and/or free form.		Editable		A version can update when changing status levels.
Customer		Pulls additional information into database, Name, Contact, Phone - from People/Address table		Lookup Table		Editable		
		Customer Name						
		Contact						
		Phone						
		Party to final contract?						
Remarketing Partner		Pulls additional information into database, Name, Contact, Phone, party to final contract - from People/Address table		Lookup Table		Editable		
		Company Name						
		Contact						
		Phone						
		Party to final contract?						
IP Group Personnel		Pulls additional information into database, Name, Role, party to final contract - from People/Address table		Lookup Table		Editable		
		Name						
		Role						
Products	Character	Pointer back to product table		Lookup Table		Editable		
Deal Size	Character	Product Name						
Deal Value	Number	Drop Down Estimate, small, medium and large		Lookup Table		Editable		
Deal Priority	Character	Actual deal value entered after the deal is closed low, medium, high		Free Form		Editable		
Include in Top Deals Report	Y/N (or CHAR)	Check box designating as important deal		Lookup Table		Editable		
Description of Project	Character	Next Scheduled Followup Date		Freeform		Editable		
Followup Date	DATE	Follow-up Actions to be Taken		Freeform		Editable		
Followup Actions	Character	Responsible Party for Follow-up - Looks at People/Address Table - Potentially allow multiple values		Freeform		Editable		
Responsible Party	Character			Lookup Table		Editable		

FIG. 41

Files	Character	pointer back to files and file comments	Freeform	Editable	Security	Comments
		File				
		Comments				
Associated Contract		Pointer that pulls information from contract table - including name	Lookup Table	Editable		
		Name				
		Agreement Type				
Contract Tracking Table						
Field Name		Data Type		Relates (KEY)		
		Description				
Agreement Number	Number			KEY	System Generated	Non-Editable
Agreement Name	Character				Freeform	Editable
Agreement Type	Character				Lookup Table	Editable
Project Number	Number	Key field for linking to marketing opportunities		Potentially a Foreign Key	Potentially a Foreign Key	Non-Editable
Parties	Character	Lookup to People/Address table			Lookup Table	Editable
		Company Name				
		Type				
		Contact				
Effective Date	DATE				Freeform	Editable
Termination/Renewal Date	DATE				Freeform	Editable
Termination/Renewal Terms	Character				Freeform	Editable
List IP	Character	List of IP Involved; pop-up box to add IP pointers, IP Type, Name, Ref #		Potentially a Foreign Key	Potentially a Foreign Key	Non-Editable
		IP Type				
		Name				
		Ref. #				
Exclusivity	Character	values: exclusive, non-exclusive			Lookup Table	Editable
Form of Agreement	Character	values: Distribution License, Straight Use License, Strategic Agreement			Lookup Table	Editable
Description	Character				Freeform	Editable
Type of Revenue	Character	values: cash, savings, cash & savings			Lookup Table	Editable
Unique T&C	Character				Freeform	Editable
Frequency of Payment	Character				Lookup Table	Editable
Reason for Termination	Character				Freeform	Editable
Type of License	Character	Do we still want this?...not on screen shots			Lookup Table	
Confidentiality Period	DATE				Freeform	Editable
						This can be a range or a final date.

FIG. 42

File	Character	Pointer to attached files and comments	Freeform	Editable		
		File Name				
		Comments				
Product	Character					
BellSouth Business Unit	Character	Pointer to BellSouth Business Unit and Royalty Percentage	Lookup Table	Editable		
		BellSouth Business Unit				
		Royalty Percentage				
Notice Date	Date					
Customers Party to Contract	Character					
Parties to Contract	Character					
Underlying Ip of Product	Character					
Action	Character	Button (field) that points to information in the action table	Lookup Table			
		Expected Due Date				
		Actual Date				
		Action Type (Lookup)				
		Expected Amount				
		Actual Amount				
		Expected Action				
		Actual Action				
		Internal Contact				
		External Contact				
		Comments				
Comments	Character		Freeform			

IP TABLE (Trade Secrets or Copyrights)

Field Name		Data Type		Description	Relates (KEY)		Location Data	Editable	Security	Comments
IP #		Number		System Generated	Primary Key		Primary Key	Non-Editable		
IP Type		Character		TS or Copyright or Both			Lookup Table	Editable		
IP Name		Character					Freeform	Editable		
BellSouth Sub-entity		Character					Freeform	Editable		
BellSouth Business Unit		Character					Lookup Table	Editable		Could also be freeform
IP Description		Character		Freeform comments			Freeform	Editable		
Associated Files Attached		Character		Pointer to electronic file and comments			Freeform	Editable		
				File Name						
				Comments						
Copyright Filed?		Character		Build Lookup N/A, Yes or No.			Lookup Table	Editable		

0 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60 61 62 63 64 65 66 67 68 69 70 71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99

Product Table

Field Name		Data Type		Description		Relates (KEY)		Location Data		Editable		Security		Comments	
Product Description		Character		Product Description				Freeform		Editable					
Product Number		Number		System Generated		Primary Key		Primary Key		Non-editable				System Generated	
BellSouth Sub-entity		Character						Freeform		Lookup Table					
BellSouth Business Unit		Character		Allow multiple values				Lookup Table		Editable				Could also be freeform	
BellSouth Contacts		Character		Pointer to People/Address Table, Name, Phone and Position (e.g., role)				Freeform		Editable					
				Name											
				Phone #											
				Position											
List of Patents		Character		Pointer to CPI Patent Database Records				CPI System		Editable					
				Status											
				Docket #											
				Country											
				App. #											
				Filing Date											
				Patent #											
				Issue Date											
				Inventor											
				Title											
				Comments - Not sure if in CPI											
List of TM		Character		Pointer to CPI TM Database Records				CPI System		Editable					
				Status											
				Mark											
				Country											
				App. #											
				Docket #											
				Filing Date											
				Reg. #											
				Reg. Date											
				Renewal Date											
				Comments - Not sure if in CPI											
List of Trade Secrets & Copyrights		Character		Pointer to IP Table				Lookup Table		Editable					
				Name											
				Description											
				BellSouth Sub-entity											
				BellSouth Business Unit											
				IP #											

FIG. 44

People/Address Table							
Field Name	Data Type	Description	Relates (KEY)	Location Data	Editable	Security	Comments
Org							
Name							
Phone							
Address							
Comments							
Position							
Roles Lookup Values							
Contact							
Research							
Other							
Contact Lookup Values							
IP Group Personnel							
End Users/Customers							
BellSouth Business Unit							
Status Lookup Values		Used in Marketing Module					
Conduct Initial Research							
Conduct Market Research and Analysis							
Develop marketing plan & package							
Sell product							
Negotiate contract							
Complete & approve transaction report							
Execute contract							
Set up maintenance plan							
Close out project							
BellSouth Business Units Lookup Values		Used in IP Inventory Module, Product Inventory Module					
BASC (Affiliate Service Corp.)							
BBi (Billing Inc.)							
BBS (Business Systems)							
BPC (Public Communications)							
BSC (Corporate)							
BSCC (Cellular)							
BSE (Entertainment)							
BSi (International)							
BSNET (.Net)							
BST (Telecommunications)							

Contacts TABLE						
Field Name	Data Type	Description	Relates (KEY)	Location Data	Editable	Security
Company Name				Freeform		
BellSouth Sub-entity				Freeform		
Type		IP Group, Remarketing, Customer, Alliance, Bellsouth				
Events		Internal				
		Pointer to Events table		Freeform		
		Date				
		Comments				
		Attached Files				
Contacts						
		Name				
		Title				
		Country				
		Address1				
		Address2				
		City				
		State				
		Zip				
		Phone				
Individual Contact Events		Pointer to Individual Contact Events Table				
		Date				
		Comments				
		Attached Files				

FIG. 49

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM



>>> connect >>

>> and create something

IP Inventory Module

Product Inventory Module

Marketing Module

Contracts Module

Searching/Reporting Module

Contacts Module

FIG. 50

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory Product Inventory Marketing Contracts/Agreements Searching/Reporting Contacts

IP Inventory

Create New Trade Secret
or Copyright Record

View Inventory

Search Inventory

Please choose an option from the menu bar on the left.

FIG. 51

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP Inventory](#) [Product Inventory](#) [Marketing](#) [Contracts/Agreements](#) [Searching/Reporting](#) [Contacts](#)

IP Inventory Module

[Create New Trade
Secret or Copyright
Record](#)

[View Inventory](#)

[Search Inventory](#)

Create/Edit Trade Secret/Copyright

IP # Copyright Filed ☐

IP Name

IP Type

BellSouth Business Unit

BellSouth Sub-entity

IP Description

Associated Files Attached

File to Attach

File Name	Comments
<input type="text"/>	<input type="text"/>

FIG. 52

[illegible][illegible]

View Inventory

Patents

Sort By N/A

Trademarks

N/A

Sort By

Cancel

Cancel

[illegible]

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP Inventory](#) [Product Inventory](#) [Marketing](#) [Contracts/Agreements](#) [Searching/Reporting](#) [Contacts](#)

IP Inventory Module

[Create New Trade Secret or Copyright Record](#)

[View Inventory](#)

[Search Inventory](#)

View Inventory

Patents

Sort By

Trademarks

Sort By

Trade

Trademark Name
TM #

Registration Date

Sort By

Status

Default

Submit

Cancel

FIG. 55

[illegible][illegible]

View Inventory

Patents

Sort By

Trademarks

N/A

Sort By

Name	Description	Default
BellSouth Entity		
Business Unit		
IP #		

Business Unit
IP #

Default

FIG. 56

[illegible][illegible][illegible][illegible][illegible][illegible][illegible][illegible][illegible][illegible][illegible][illegible][illegible]

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP Inventory](#) [Product Inventory](#) [Marketing](#) [Contracts/Agreements](#) [Searching/Reporting](#) [Contacts](#)

IP Inventory Module

Create New Trade Secret
or Copyright Record

View Inventory

Search Inventory

Patents - CPI System

Trademarks - CPI System

Trade Secrets & Copyrights

FIG. 58

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP Inventory](#) [Product Inventory](#) [Marketing](#) [Contracts/Agreements](#) [Searching/Reporting](#) [Contacts](#)

IP Inventory Module

Create New Trade Secret or
Copyright Record

View Inventory

Search Inventory

Search Patents

Status		Filing Date	
Docket #		Patent #	
Country		Issue Date	
App. #		Title	
Inventor		Comments	

Search All Fields

Search

Cancel

FIG. 59

if it is this and add it to the list of items if it is this and add it to the list of items if it is this and add it to the list of items

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP Inventory](#) [Product Inventory](#) [Marketing](#) [Contracts/Agreements](#) [Searching/Reporting](#) [Contacts](#)

IP Inventory Module

[Create New Trade Secret or Copyright Record](#)

[View Inventory](#)

[Search Inventory](#)

Search Trademarks

Status	<input type="text"/>	Filing Date	<input type="text"/>
Mark	<input type="text"/>	Reg. #	<input type="text"/>
Country	<input type="text"/>	Reg. Date	<input type="text"/>
Docket #	<input type="text"/>	Renewal Date	<input type="text"/>
App. #	<input type="text"/>	Comments	<input type="text"/>

Search All Fields

FIG. 61

[illegible][illegible][illegible][illegible]

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory Product Inventory Marketing Contracts/Agreements Searching/Reporting Contacts

<p><u><i>IP Inventory Module</i></u></p> <p><u>Create New Trade Secret or Copyright Record</u></p> <p><u>View Inventory</u></p> <p><u>Search Inventory</u></p>	<p><u>Search Trade Secret/Copyright Issue</u></p> <p>IP# <input type="text"/> Copyright Filed <input type="text" value="N/A"/></p> <p>IP Name <input type="text"/></p> <p>IP Type <input type="text" value="N/A"/></p> <p>BellSouth Business Unit <input type="text"/></p> <p>BellSouth Sub-entity <input type="text"/></p> <p>IP Description <input type="text"/></p> <p>Full Text File Search <input type="text"/></p> <p><input type="button" value="Search"/> <input type="button" value="Cancel"/></p>
--	--

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory Product Inventory Marketing Contracts/Agreements Searching/Reporting Contacts

<u>Search Results</u>					
<u>Trade Secrets & Copyrights</u>					
<u>Create New Trade Secret or Copyright Record</u>	<u>Name</u>	<u>Type</u>	<u>IP #</u>	<u>BellSouth Business Unit</u>	<u>BellSouth Sub-entity</u>
<u>View Inventory</u>	<u>Data</u>	<u>Data</u>	<u>Data</u>	<u>Data</u>	<u>Data</u>
<u>Search Inventory</u>					

FIG. 64

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory Product Inventory Marketing Contracts/Agreements Searching/Reporting Contacts

Product Inventory

Please choose an option from the menu bar on the left.

Create New
Product

View Products

Search For
Product

[View/Edit](#)
[Contacts](#)

FIG. 65

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts
Inventory Inventory

Product
Inventory
Module

Create/Edit Product

Create New
Product

View Products

Search For
Product

View/Edit
Contacts

Product Name

Product Number 1234343

BellSouth Business Unit

BellSouth Sub-entity

Product Description

Date Available for Sale

Technical Requirements

BellSouth Contacts

FIG. 66

BellSouth Contacts

<u>Name</u>	<u>Phone #</u>	<u>Position</u>
<input type="button" value="Add Contact"/>		
<input type="button" value="Remove Contact"/>		

List of IP

Patents

<u>Status</u>	<u>Docket #</u>	<u>Country</u>	<u>App. #</u>	<u>Filing Date</u>	<u>Patent #</u>	<u>Issue Date</u>	<u>Inventor</u>	<u>Title</u>	<u>Comments</u>
<input type="button" value="Add Patents"/>									
<input type="button" value="Remove Patents"/>									

Trademarks

<u>Status</u>	<u>Mark</u>	<u>Country</u>	<u>Docket #</u>	<u>App #</u>	<u>Filing Date</u>	<u>Reg. #</u>	<u>Reg. Date</u>	<u>Renewal Date</u>	<u>Comments</u>
<input type="button" value="Add Trademarks"/>									
<input type="button" value="Remove Trademarks"/>									

Trade Secrets & Copyrights

FIG. 67

[illegible]

IP Inventory

Product Inventory Module

[Create New Product](#)

[View Products](#)

[Search For Product](#)

[View/Edit Contacts](#)

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts
Inventory Inventory

View All Products By Specific BellSouth Business Unit

Create New
Product

View Products

Search For
Product

View/Edit
Contacts

BellSouth Business Unit:

Submit

BASC
BBI
BBS
BPC
BSC
BSCC
BSE
BSI
BSNET
BST

FIG. 72

[illegible]

IP Inventory Product Inventory

**Product
Inventory
Module**

[Create New Product](#)
[View Products](#)
[Search For Product](#)
[View/Edit Contacts](#)

FIG. 73

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory Product Inventory Marketing Contracts/Agreements Searching/Reporting Contacts

View Products Advanced View

Product Inventory Module

Create New Product

View Products

Search For
Product

[View/Edit](#)
[Contacts](#)

1.) Sort By:

N/A

2.) Sort By:

N/A

3.) Sort By:

N/A

Submit

Cancel

FIG. 74

IP Inventory Product Inventory Marketing Contracts/Agreements Searching/Reporting Contacts

Product Inventory Module	<h2 style="text-align: center;"><u>View Products Advanced View</u></h2>
Create New Product View Products	<div> <div>1.) Sort By:</div> <div>N/A</div> <div>2.) Sort By:</div> <div>N/A</div> <div>3.) Sort By:</div> <div>N/A</div> <div> <input type="button" value="Submit"/> <div> <div>BellSouth Entity Name</div> <div>Description</div> </div> </div> </div>
Search For Product View/Edit Contacts	

[illegible]

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP
Inventory
Product
Inventory
Marketing Contracts/Agreements
Searching/Reporting Contacts

View Products Advanced View

**Product
Inventory
Module**

Create New
Product

View Products

Search For
Product

[View/Edit](#)
[Contacts](#)

1.) Sort By: Name

2.) Sort By:

3.) Sort By:

Submit

Cancel

FIG. 76

[illegible]

<u>IP</u> Inventory	<u>Product</u> Inventory
100	100
200	200
300	300
400	400
500	500
600	600
700	700
800	800
900	900
1000	1000

Product Inventory Module

Create New
Product

Search For
Product

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FIG. 77

[illegible]

IP Inventory **Product Inventory**

Product Inventory Module

Create New
Product

View
Products

Search For
Product

[View/Edit](#)
[Contacts](#)

100

[illegible]

TABLE 1. *Continued*

100

Date Available for Sale

100

BellSouth Contacts

FIG. 78

BellSouth Contacts

<u>Name</u>	<u>Phone #</u>	<u>Position</u>

Add Contact

Remove Contact

List of IP

Patents

<u>Status</u>	<u>Docket#</u>	<u>Country</u>	<u>App.#</u>	<u>Filing Date</u>	<u>Patent #</u>	<u>Issue Date</u>	<u>Inventor</u>	<u>Title</u>	<u>Comments</u>

Add Patents

Remove Patents

Trademarks

<u>Status</u>	<u>Mark</u>	<u>Country</u>	<u>Docket#</u>	<u>App#</u>	<u>Filing Date</u>	<u>Reg.#</u>	<u>Reg. Date</u>	<u>Renewal Date</u>	<u>Comments</u>

Add Trademarks

Remove Trademarks

Trade Secrets & Copyrights

It is to be understood that the present disclosure is not limited to the specific details and components shown and described herein. It is to be understood that the present disclosure is not limited to the specific details and components shown and described herein.

Trade Secrets & Copyrights

Name	Description	BellSouth Sub-entity	Business Unit	IP#

Add Trade Secrets or Copyrights

Remove Trade Secrets or Copyrights

Associated Files Attached

File Name	Comments

Full Text File Search

Search

Cancel

FIG. 80

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product
Inventory Inventory Marketing Contracts/Agreements Searching/Reporting Contacts

<i><u>Product Inventory Module</u></i>	<i><u>Product Search Results</u></i>
<u>Create New Product</u> <u>View Products</u> <u>Search For Product</u> <u>View/Edit Contacts</u>	<u>Product Name</u> <u>Data1</u> <u>Any Criteria Used in Search</u> <u>Data2</u>

FIG. 81

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts
Inventory Inventory

<u>Product Inventory Module</u>	<u>View Product</u>						
<u>Create New Product</u>	Product Number 12323 Product Name Product						
<u>View Products</u>	BellSouth Sub-entity Entity BellSouth Business Unit Main Unit						
<u>Search For Product</u>	Product Description <input type="text"/>						
<u>View/Edit Contacts</u>	Date Available for Sale 2/14/2000						
	Technical Requirements <input type="text"/>						
BellSouth Contacts							
	<table border="1"><tr><td><u>Name</u></td><td><u>Phone #</u></td><td><u>Position</u></td></tr><tr><td>Howard Johnson</td><td>1-800-555-1212</td><td>Director</td></tr></table>	<u>Name</u>	<u>Phone #</u>	<u>Position</u>	Howard Johnson	1-800-555-1212	Director
<u>Name</u>	<u>Phone #</u>	<u>Position</u>					
Howard Johnson	1-800-555-1212	Director					
List of IP							

FIG. 82

List of IP

Patents

Status	Docket#	Country	App.#	Filing Date	Patent #	Issue Date	Inventor	Title	Comments

Trademarks

Status	Mark	Country	Docket#	App#	Filing Date	Reg.#	Reg. Date	Renewal Date	Comments

Trade Secrets & Copyrights

Name	Description	BellSouth Sub-entity	Business Unit	IP#

Associated Files Attached

File Name	Comments

Edit

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory Product Inventory Marketing Contracts/Agreements Searching/Reporting Contacts

Marketing

Please choose an option from the menu bar on the left.

Create New Project

View/Edit Project

Search/Report Projects

[View/Edit Contacts](#)

FIG. 84

[illegible][illegible][illegible][illegible]

FIG. 86

IP Group Personnel

<u>Name</u>	<u>Role</u>
-------------	-------------

Add IP Personnel

Remove IP Personnel

Associated Files Attached

File to Attach

Browse...

Remove File

<u>File Name</u>	<u>Comments</u>
------------------	-----------------

Contract Records

<u>Contract Name</u>	<u>Agreement Type</u>
----------------------	-----------------------

Create Contract Record

Add Associated Contract Record

Remove Associated Contract Record

Submit

Cancel

FIG. 87

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory Product Inventory Marketing Contracts/Agreements Searching/Reporting Contacts

<u>Marketing Module</u>	<u>View Projects</u>
<u>Create New Project</u>	<u>Default Search</u>
<u>View/Edit Project</u>	<u>Custom Sort</u>
<u>Search/Report Projects</u>	1.) Sort By: <input type="text" value="N/A"/>
<u>View/Edit Contacts</u>	2.) Sort By: <input type="text" value="N/A"/>
	3.) Sort By: <input type="text" value="N/A"/>
	<input type="button" value="Submit"/> <input type="button" value="Cancel"/>

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory Product Inventory Marketing Contracts/Agreements Searching/Reporting Contacts

Marketing Module	View Project
Create New Project View/Edit Projects Search/Report Projects View/Edit Contacts	<div data-bbox="560 495 1005 621"> <div data-bbox="560 495 592 621">Project # 12334</div> <div data-bbox="615 495 647 621">Status Date 2/2/2000</div> <div data-bbox="669 495 701 621">Deal Size Small</div> <div data-bbox="724 495 756 621">Deal Priority Low</div> </div> <div data-bbox="560 621 1005 1736"> <div data-bbox="560 621 592 1736">Project Name Name</div> <div data-bbox="615 621 647 1736">Status Conduct Initial Research</div> <div data-bbox="669 621 701 1736">Deal Value \$1.2 Billion</div> <div data-bbox="724 621 756 1736">Include in Top Deals Report <input type="checkbox"/></div> <div data-bbox="777 621 1005 1736">Description of Project</div> <div data-bbox="919 621 1005 1736"> <div data-bbox="919 621 1005 690"> <div data-bbox="919 621 951 690">◀</div> <div data-bbox="951 621 984 690">▶</div> </div> <div data-bbox="919 690 1005 1736"></div> </div> </div> <div data-bbox="560 1736 1005 1862"> <div data-bbox="560 1736 592 1862">Follow-up Date 2/2/2000</div> <div data-bbox="615 1736 647 1862">Responsible Party Mike Stevens</div> <div data-bbox="669 1736 701 1862">Follow-up Actions Action</div> </div>
	<div data-bbox="560 621 1472 1862"> <div data-bbox="560 621 615 1862"><u>Products</u></div> <div data-bbox="615 621 1276 1862"> <div data-bbox="615 621 647 1862"><u>Product Name</u></div> <div data-bbox="669 621 701 1862"><u>Product</u></div> <div data-bbox="724 621 756 1862"><u>Customer</u></div> </div> </div>

FIG. 90

IBM Corp. 1989 and IBM Corp. 1990. All rights reserved. IBM, the IBM logo, and the "Think" logo are trademarks of International Business Machines Corporation. All other trademarks are the property of their respective owners.

Customer

<u>Customer Name</u>	<u>Contact</u>	<u>Phone</u>	<u>Party to Final Contract</u>
IBM	John Jim	212-555-1212	<input type="checkbox"/>

Remarketing Partners

<u>Company Name</u>	<u>Contact</u>	<u>Phone</u>	<u>Party to Final Contract</u>
IBM	Bob Smith	212-555-1212	<input type="checkbox"/>

IP Group Personnel

<u>Name</u>	<u>Role</u>
-------------	-------------

Associated Files Attached

<u>File Name</u>	<u>Comments</u>

Contract Records

<u>Contract Name</u>	<u>Agreement Type</u>

Edit

FIG. 91

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP](#) [Product](#) [Marketing](#) [Contracts/Agreements](#) [Searching/Reporting](#) [Contacts](#)
[Inventory](#) [Inventory](#)

Marketing Module	<p>View Projects</p> <p>Default Search</p> <p>Custom Sort</p> <p>1.) Sort By: <input type="text" value="Customer Company Name"/></p> <p>2.) Sort By: <input type="text" value="Product Name"/></p> <p>3.) Sort By: <input type="text" value="Customer Company Name"/></p> <p>N/A</p> <p><input type="button" value="Submit"/></p> <p>Customer Company Name Product Name Remarking Partner Company Name Status Deal Priority Deal Value Deal Size IP Group Personnel</p>
<p>Create New Project</p> <p>View/Edit Project</p> <p>Search/Report Projects</p> <p>View/Edit Contacts</p>	

FIG. 92

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts
Inventory Inventory

<u>Marketing Module</u>	<u>Edit Project</u>
<u>Create New Project</u>	Project Name <input type="text"/>
<u>View/Edit Project</u>	Status <input type="text"/>
<u>Search/Report Projects</u>	Deal Value <input type="text"/>
<u>View/Edit Contacts</u>	Include in Top Deals Report <input type="checkbox"/>
	Description of Project <input type="text"/>
	Follow-up Date <input type="text"/>
	Responsible Party <input type="text"/>
	Follow-up Actions <input type="text"/>
	Products <input type="text"/>
	Product Name <input type="text"/>

FIG. 94

Products

<u>Product Name</u>	

Add Product

Remove Product

Customer

<u>Customer Name</u>	<u>Contact</u>	<u>Phone</u>	<u>Party to Final Contract</u>

Add Customers

Remove Customers

Remarketing Partners

<u>Company Name</u>	<u>Contact</u>	<u>Phone</u>	<u>Party to Final Contract</u>

Add Partner

Remove Partner

IP Group Personnel

FIG. 95

[illegible]

<u>IP Group Personnel</u>	
<u>Name</u>	<u>Role</u>
<input type="button" value="Add IP Personnel"/>	<input type="button" value="Remove IP Personnel"/>

Associated Files Attached

<input type="text"/>	<input type="button" value="Browse..."/>	<input type="button" value="Remove File"/>
----------------------	--	--

File to Attach

<u>File Name</u>	<u>Comments</u>
<input type="text"/>	<input type="text"/>

Contract Records

<u>Contract Name</u>	<u>Agreement Type</u>
<input type="text"/>	<input type="text"/>

<input type="button" value="Create Contract"/>	<input type="button" value="Add Associated Contract"/>	<input type="button" value="X"/>
--	--	----------------------------------

<input type="button" value="Submit"/>	<input type="button" value="Cancel"/>
---------------------------------------	---------------------------------------

FIG. 96

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product
Inventory Inventory

Marketing Contracts/Agreements Searching/Reporting Contacts

<u>Marketing Module</u>	<u>Project Search/Reports</u>
<u>Create New Project</u>	Project Name <input type="text"/>
<u>View/Edit Project</u>	Status <input type="text" value="N/A"/>
<u>Search/Report Projects</u>	Deal Value <input type="text"/>
<u>Standard Project Reports</u> <ul style="list-style-type: none"><u>Top Deals</u><u>Customer Report</u><u>Remarketing Report</u><u>Status Level Report</u><u>BellSouth Entity Report</u>	Project # <input type="text"/>
	Status Date <input type="text"/>
	Deal Size <input type="text" value="N/A"/>
	Deal Priority <input type="text" value="N/A"/>
	Include in Top Deals Report <input type="checkbox"/>
	Description of Project <input type="text"/>
	Follow-up Date <input type="text"/>
	Follow-up <input type="text"/>
	Actions <input type="text"/>
	Responsible Party <input type="text" value="N/A"/>
	Products <input type="text"/>
<u>View/Edit Contacts</u>	Product Name <input type="text"/>

FIG. 97

Report

View/Edit Contacts

<u>Product Name</u>	

Add Product	Remove Product
-------------	----------------

Customer

<u>Customer Name</u>	<u>Contact</u>	<u>Phone</u>	<u>Party to Final Contract</u>
			<input type="checkbox"/>

Add Customer	Remove Customer
--------------	-----------------

Remarketing Partners

<u>Company Name</u>	<u>Contact</u>	<u>Phone</u>	<u>Party to Final Contract</u>
			<input type="checkbox"/>

Add Remarketing Partner	Remove Remarketing Partner
-------------------------	----------------------------

IP Group Personnel

FIG. 98

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts
Inventory Inventory

<u>Marketing Module</u>	<u>Project Search/Reports</u>
Create New Project View/Edit Project	Project Name <input type="text"/> Project # <input type="text"/> Status <input type="text"/> N/A Status Date <input type="text"/> Deal V <input type="text"/> N/A Deal Size <input type="text"/> Medium Include <input type="text"/> Deal Priority <input type="text"/> high Desc of Pro <input type="text"/> Follo <input type="text"/> Responsible Party <input type="text"/> N/A
Search/Report Projects <u>Standard Project Reports</u>	Conduct Initial Research Conduct market research and analysis Complete and approve PTR Develop marketing plan & package Sell product Negotiate contract Complete & approve transaction report Execute contract Set up maintenance plan Close out Project
<ul style="list-style-type: none"> • Top Deals • Customer Report • Remarketing Report • Status Level Report • BellSouth Entity Report 	Products
View/Edit Contacts	Product Name <input type="text"/>

FIG. 100

[illegible]FIG. 101

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP](#) [Product](#) [Marketing Contracts/Agreements Searching/Reporting Contacts](#)
[Inventory](#) [Inventory](#)

<i>Marketing Module</i>	<u>Top Deals Report</u>
Create New Project View/Edit Project Search/Report Projects Standard Project Reports <ul style="list-style-type: none"> • Top Deals • Customer Report • Remarketing Report • Status Level Report • BellSouth Business Unit View/Edit Contacts	<div> <div> Status Data1 </div> <div> Product/Project Name Data2 </div> <div> Opp # Data3 </div> <div> BellSouth Patent Company Data4 </div> <div> Status Data5 </div> <div> EU Data6 </div> <div> Company Name Data7 </div> <div> Lead Support Data8 </div> <div> Est. Value Data9 </div> <div> Deal Size Data10 </div> <div> Priority Data11 </div> </div>

FIG. 102

[illegible]

IP
Inventory

<p><u>Marketing Module</u></p>	<p><u>Customer Report</u></p>
<div> <div> <div>Submit</div> <div>Cancel</div> </div> <div> <div>Customer Name</div> <div>Customer Name</div> </div> </div>	<div> <div> <div>Create <u>New Project</u></div> <div> <div><u>View/Edit Project</u></div> <div> <div><u>Search/Report Project</u></div> <div> <div>Standard Project Reports</div> <div> <ul style="list-style-type: none"> • <u>Top Deals</u> • <u>Customer Report</u> • <u>Remarketing Report</u> • <u>Status Level Report</u> • <u>BellSouth Business Unit</u> </div> </div> </div> <div><u>View/Edit Contacts</u></div> </div> </div> </div>

FIG. 103

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP Inventory](#)
[Product Inventory](#)
[Marketing](#)
[Contracts/Agreements](#)
[Searching/Reporting](#)
[Contacts](#)

<u>Marketing Module</u>	<u>Customer Report</u>
Create New Project View/Edit Project Search/Report Projects Standard Project Reports <ul style="list-style-type: none"> • Top Deals • Customer Report • Remarketing Report • Status Level Report • BellSouth Business Unit View/Edit Contacts	<div> <div>Customer Name</div> <div>Data1</div> </div> <div> <div>Product Name</div> <div>Data2</div> </div> <div> <div>Status</div> <div>Data3</div> </div> <div> <div>Value</div> <div>Data4</div> </div> <div> <div>BellSouth Business Unit</div> <div>Data5</div> </div> <div> <div>Opp.#</div> <div>Data6</div> </div>

FIG. 103A

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts
Inventory Inventory

<u>Marketing Module</u>	<u>Remarketing Partner Report</u>
<u>Create New Project</u> <u>View/Edit Project</u> <u>Search/Report Projects</u> <u>Standard Project Reports</u> <ul style="list-style-type: none">• <u>Top Deals</u>• <u>Customer Report</u>• <u>Remarketing Report</u>• <u>Status Level Report</u>• <u>BellSouth Business Unit</u> <u>View/Edit Contacts</u>	<u>Remarketing Company Name</u> <input type="text" value="Company Name"/> <div><input type="button" value="Submit"/> <input type="button" value="Cancel"/></div>

FIG. 104

[illegible]FIG. 105

FIG. 105

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory Product Inventory Marketing Contracts/Agreements Searching/Reporting Contacts

<p><u>Marketing Module</u></p>	<div data-bbox="466 1066 518 1541"> <h1><u>Status Level Report</u></h1> </div> <div data-bbox="581 747 630 1541"> <p>Status Level N/A</p> </div> <div data-bbox="755 1276 813 1541"> <p>Submit Cancel</p> </div> <div data-bbox="581 1604 613 1860"> <p><u>Create New Project</u></p> </div> <div data-bbox="660 1625 693 1860"> <p><u>View/Edit Project</u></p> </div> <div data-bbox="740 1673 808 1860"> <p><u>Search/Report Projects</u></p> </div> <div data-bbox="855 1583 935 1860"> <p>Standard Project Reports</p> </div> <div data-bbox="982 1575 1393 1806"> <ul style="list-style-type: none"> • <u>Top Deals</u> • <u>Customer Report</u> • <u>Remarketing Report</u> • <u>Status Level Report</u> • <u>BellSouth Business Unit</u> </div> <div data-bbox="1435 1610 1468 1860"> <p><u>View/Edit Contacts</u></p> </div>
---------------------------------------	--

FIG. 106

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts
Inventory Inventory

<u>Marketing Module</u>	<u>Status Level Report</u>
<u>Create New Project</u>	<u>Status Level</u> <input type="text" value="N/A"/>
<u>View/Edit Project</u>	<input type="text" value="N/A"/>
<u>Search/Report Projects</u>	<div><div>Submit</div><div>Can</div></div> <div>Conduct Initial Research Conduct market research and analysis Complete and approve PTR Develop marketing plan & package Sell product Negotiate contract Complete & approve transaction report Execute contract Set up maintenance plan Close out Project</div>
<u>Standard Project Reports</u>	
<ul style="list-style-type: none"><u>Top Deals</u><u>Customer Report</u><u>Remarketing Report</u><u>Status Level Report</u><u>BellSouth Business Unit</u>	
<u>View/Edit Contacts</u>	

FIG. 107

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product
Inventory Inventory Marketing Contracts/Agreements Searching/Reporting Contacts

<u>Marketing Module</u>	<u>Status Level Report</u>
<div> Create New Project View/Edit Project Search/Report Projects Standard Project Reports <ul style="list-style-type: none"> • <u>Top Deals</u> • <u>Customer Report</u> • <u>Remarketing Report</u> • <u>Status Level Report</u> • <u>BellSouth Business Unit</u> View/Edit Contacts </div>	<div> <div> <u>Level</u> Date1 </div> <div> <u>Company</u> Name </div> <div> <u>Product</u> Name </div> <div> <u>Remarketing</u> Partner </div> <div> <u>BellSouth</u> Business Unit </div> <div> <u>IP Group</u> Personnel </div> <div> <u>Deal</u> Size </div> <div> <u>Deal</u> Value </div> <div>Data2</div> <div>Data3</div> <div>Data4</div> <div>Data5</div> <div>Data6</div> <div>Data7</div> <div>Data8</div> <div>Data9</div> <div>Data10</div> </div>

FIG. 108

[illegible]

IP Inventory

Marketing Module

BellSouth Business Unit

Submit

Submit Cancel

BASC
BBI
BBS
BPC
BSC
BSCC
BSE
BSI
BSNET
BST

- [View/Edit Contacts](#)

FIG. 109

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts
Inventory Inventory

Contracts/Agreements

Please choose an option from the menu bar on the left.

Add
Contract/Agreement
Search
Contracts/Agreements
Contract Reports
View/Edit Contacts

FIG. 111

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts
Inventory Inventory

Contracts/Agreements Module

Add Contract/Agreement

Search
Contracts/Agreements

Contract Reports

View/Edit Contacts

Add Contract/Agreement

Agreement Name Agreement Number 12323
Agreement Type Project Number
Product

Contract Summary

Exclusivity <input type="text"/>	Form of Agreement <input type="text"/>
Type of Revenue <input type="text"/>	Unique T&C <input type="text"/>
Frequency of Payments <input type="text"/>	
Description <input type="text"/>	

Termination or Renewal Terms

FIG. 112

Termination or Renewal Terms



Confidentiality Period	Notice Date
Effective Date	
Termination/Renewal Date	Reason for Termination

BellSouth Business Unit

<u>BellSouth Business Unit</u>	<u>Royalty Percentage</u>

Add BellSouth BU Remove BellSouth BU

Parties to the Contract

<u>Company Name</u>	<u>Type</u>	<u>Contact</u>

Add Party Remove Party

FIG. 113

Add Party	Remove Party

IP Covered by License

IP Type	Name	Ref #

Add Associated IP	Remove Associated IP

Actions/Payments Due

Expected Due Date	Actual Date	Action Type	Expected Amount	Actual Amount	Expected Action	Actual Action	Internal Contact	External Contact	Comments

Add Action Item	Remove Action Item	Add Internal Party	Add External Party

Comments

FIG. 114

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts
Inventory Inventory

Contracts/Agreements
Module

Add Contract/Agreement

Search
Contracts/Agreements

Contract Reports

View/Edit Contacts

Add Contract/Agreement

Agreement Name Agreement Number 12323

Agreement Type Project Number

- Administrative Services Agreement
- Master Licensing Agreement
- Sublicensing Agreement
- Services Agreement
- Sublease Agreement
- Consulting Agreements
- Recruiter Agreement
- Remarketing Agreements

Form of Agreement

Unique T&C

Type of Revenue

Frequency of Payments

Description

FIG. 116

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts
Inventory Inventory

Contracts/Agreements
Module

Add Contract/Agreement

Search
Contracts/Agreements

Contract Reports

View/Edit Contacts

Add Contract/Agreement

Agreement Name Agreement Number 12323
Agreement Type Project Number
Product

Contract Summary

Exclusivity <input type="text"/>	Form of Agreement <input type="text"/>
Type of Revenue <input type="text"/>	Unique T&C <input type="text"/>
Frequency of Payments <input type="text"/>	Distribution License Straight Use License Strategic Agreement
Description <input type="text"/>	

FIG. 117

[illegible]

Marketing Contracts/Agreements Searching/Reporting Contacts

Add Contract/Agreement

Agreement Number 12323

Project Number

Product

Contract Summary

Exclusivity	Form of Agreement
Type of Revenue	Unique T&C
Frequency of Payment	
Description	

FIG. 118

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts
Inventory Inventory

Contracts/Agreements
Module

Add Contract/Agreement

Add Contract/Agreement

Search
Contracts/Agreements

Contract Reports

View/Edit Contacts

Agreement Name Agreement Number 12323

Agreement Type Project Number

Product

Contract Summary

Exclusivity <input type="text"/>	Form of Agreement <input type="text"/>
Type of Revenue <input type="text"/>	Unique T&C <input type="text"/>
Frequency of Payments <input type="text"/>	
<input type="text"/>	
<input type="text"/>	
One-time Development/Maintenance Savings	
One Time Up-Front License Fee	
One Time Up-Front License Fee w/ Future Royalties Due	
Monthly Report/Royalty Payment	
Quarterly Report/Royalty Payment	
Annual Report/Royalty Payment	

FIG. 119

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts
Inventory Inventory

*Contracts/Agreements
Module*

Add Action

Action Type

Expected An

Expected Ac

Internal Cont

Expected Due Date

Start of Period

End of Period

External Contact

Recurring Actions

Date

Comments:

FIG. 120A

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts
Inventory Inventory

<u>Contracts/Agreements Module</u>	<u>Search Contracts/Agreements</u>
<u>Add Contract/Agreement</u>	<div>Agreement Name <input type="text"/></div> <div>Agreement Number <input type="text"/></div> <div>Search <u>Contracts/Agreements</u></div> <div>Project Number <input type="text"/></div> <div><u>Contract Reports</u></div> <div><u>View/Edit Contacts</u></div> <div>Product <input type="text"/></div>
<u>Contract Summary</u>	
<div>Exclusivity <input type="text"/></div> <div>Type of Revenue <input type="text"/></div> <div>Frequency of Payments <input type="text"/></div> <div>Description <input type="text"/></div>	<div>Form of Agreement <input type="text"/></div> <div>Unique T&C <input type="text"/></div>

FIG. 121

Description
<div data-bbox="126 527 126 550" style="border: 1px solid black; padding: 2px; text-align: center;">▶</div> <div data-bbox="126 550 126 1318" style="border: 1px solid black; height: 670px;"></div>

Termination or Renewal Terms

Confidentiality Period	Notice Date
Effective Date	
Termination/Renewal Date	Reason for Termination

BellSouth Business Units

<u>BellSouth Business Unit</u>	<u>Royalty Percentage</u>

Add BellSouth BU Remove BellSouth BU

Parties to the Contract

Company Name	Type	Contact

Add Party Remove Party

FIG. 122.

Variable	Mean	SD	Min	Max
Age	38.5	12.5	25	65
Gender	0.5	0.5	0	1
Marital Status	0.7	0.5	0	1
Education	12.5	2.5	9	16
Income	3500	1500	1000	8000
Health	0.8	0.3	0	1
Stress	0.6	0.4	0	1
Workload	0.7	0.5	0	1
Support	0.9	0.2	0	1
Resilience	0.7	0.4	0	1
Adaptability	0.8	0.3	0	1
Optimism	0.7	0.4	0	1
Perseverance	0.8	0.3	0	1
Empathy	0.9	0.2	0	1
Communication	0.8	0.3	0	1
Teamwork	0.9	0.2	0	1
Problem Solving	0.8	0.3	0	1
Decision Making	0.7	0.4	0	1
Leadership	0.6	0.5	0	1
Conflict Resolution	0.7	0.4	0	1
Time Management	0.8	0.3	0	1
Organization	0.9	0.2	0	1
Attention to Detail	0.8	0.3	0	1
Initiative	0.7	0.4	0	1
Accountability	0.9	0.2	0	1
Collaboration	0.8	0.3	0	1
Flexibility	0.7	0.4	0	1
Resilience	0.8	0.3	0	1
Adaptability	0.9	0.2	0	1
Optimism	0.7	0.4	0	1
Perseverance	0.8	0.3	0	1
Empathy	0.9	0.2	0	1
Communication	0.8	0.3	0	1
Teamwork	0.9	0.2	0	1
Problem Solving	0.8	0.3	0	1
Decision Making	0.7	0.4	0	1
Leadership	0.6	0.5	0	1
Conflict Resolution	0.7	0.4	0	1
Time Management	0.8	0.3	0	1
Organization	0.9	0.2	0	1
Attention to Detail	0.8	0.3	0	1
Initiative	0.7	0.4	0	1
Accountability	0.9	0.2	0	1
Collaboration	0.8	0.3	0	1
Flexibility	0.7	0.4	0	1
Resilience	0.8	0.3	0	1
Adaptability	0.9	0.2	0	1
Optimism	0.7	0.4	0	1
Perseverance	0.8	0.3	0	1
Empathy	0.9	0.2	0	1
Communication	0.8	0.3	0	1
Teamwork	0.9	0.2	0	1
Problem Solving	0.8	0.3	0	1
Decision Making	0.7	0.4	0	1
Leadership	0.6	0.5	0	1
Conflict Resolution	0.7	0.4	0	1
Time Management	0.8	0.3	0	1
Organization	0.9	0.2	0	1
Attention to Detail	0.8	0.3	0	1
Initiative	0.7	0.4	0	1
Accountability	0.9	0.2	0	1
Collaboration	0.8	0.3	0	1
Flexibility	0.7	0.4	0	1
Resilience	0.8	0.3	0	1
Adaptability	0.9	0.2	0	1
Optimism	0.7	0.4	0	1
Perseverance	0.8	0.3	0	1
Empathy	0.9	0.2	0	1
Communication	0.8	0.3	0	1
Teamwork	0.9	0.2	0	1
Problem Solving	0.8	0.3	0	1
Decision Making	0.7	0.4	0	1
Leadership	0.6	0.5	0	1
Conflict Resolution	0.7	0.4	0	1
Time Management	0.8	0.3	0	1
Organization	0.9	0.2	0	1
Attention to Detail	0.8	0.3	0	1
Initiative	0.7	0.4	0	1
Accountability	0.9	0.2	0	1
Collaboration	0.8	0.3	0	1
Flexibility	0.7	0.4	0	1
Resilience	0.8	0.3	0	1
Adaptability	0.9	0.2	0	1
Optimism	0.7	0.4	0	1
Perseverance	0.8	0.3	0	1

IP Product

Inventory

Marketing Contracts/Agreements Searching/Reporting Contacts

Add Contract/Agreement

Search Contracts/Agreements

Contract Reports

View/Edit Contacts

Agreement

Name _____

Data1

Agreement

Number

Data2

Agreement

Type

Data3

Project #

Data4

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product
Inventory Inventory

Marketing Contracts/Agreements Searching/Reporting Contacts

Contracts/Agreements Module

Add Contract/Agreement

Search
Contracts/Agreements

Contract Reports

View/Edit Contacts

Contract/Agreement

Agreement Name Name Agreement Number 12323

Agreement Type Contract Project Number 1234

Product Product

Contract Summary

Exclusivity Exclusive

Form of Agreement Straight Use
License

Type of Revenue Cash

Unique T&C Text

Frequency of Payments Annual Report/Royalty Payment

Description A nice piece of IP

Termination or Renewal Terms

--

Confidentiality Period 2/14/2000

Notice Date 2/14/2000

FIG. 125

Confidentiality Period 2/14/2000	Notice Date 2/14/2000
Effective Date 2/14/2000	
Termination/Renewal Date 2/14/2000	Reason for Termination None

BellSouth Business Unit

BellSouth Business Unit	Royalty Percentage
Cellular	100

Parties to the Contract

Company Name	Type	Contact
Party	Remarking	Carter Pate

IP Covered by License

IP Type	Name	Ref #
Patent	Cell Phone	1234

Actions/Payments Due

FIG. 126

[illegible]

Marketing Contracts/Agreements Searching/Reporting Contacts

Edit Contract/Agreement

[illegible]

Agreement Type 1

Project Number

1000

Contract Summary

Form of

Agreement

Unique T&O



Termination or Renewal Terms

FIG. 128

if it is then will not be if it is then will not be if it is then will not be if it is then will not be if it is then will not be

Termination or Renewal Terms

--

Confidentiality Period		Notice Date	
Effective Date			
Termination/Renewal Date		Reason for Termination	

BellSouth Business Units

BellSouth Business Unit	Royalty Percentage

Add BellSouth BU	Remove BellSouth BU
------------------	---------------------

Parties to the Contract

Company Name	Type	Contact

Add Party	Remove Party
-----------	--------------

IP Covered by License

FIG. 129

IP Covered by License

IP Type	Name	Ref #
---------	------	-------

Add Associated IP Remove Associated IP

Action/Payments Due

[illegible]

Comments

FIG. 130

Comments

File to Attach

Browse...

Remove File

File Name

Comments

Submit

Cancel

FIG. 131

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contracts
Inventory Inventory

<u>Contract/Agreements</u> <u>Module</u>	<u>Contracts Reports</u>
<u>Add Contract/Agreement</u> <u>Search</u> <u>Contracts/Agreements</u> <u>Contract Reports</u> <u>Upcoming</u> <u>Termination Report</u> <u>Royalty/Reporting</u> <u>Requirements By</u> <u>Date</u> <u>Contracts By</u> <u>BellSouth Business</u> <u>Unit</u> <u>Financial Report By</u> <u>Period</u>	Please select a report from the left menu bar.

FIG. 132

Please select a report from the left menu
bar.

Search
Contracts/Agreements

Contract Reports

Upcoming

Termination Report

Royalty/Reporting

Requirements By

Date

Contracts By

BellSouth Business

Unit

Financial Report By

Period

Financial Report By

BellSouth Business

Unit

Action Report

Party Report

View/Edit Contacts

FIG. 133

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts
Inventory Inventory

Contract/Agreements Module

Add Contract/Agreement

Search

Contracts/Agreements

Contract Reports

Upcoming

Termination

Report

Royalty/Reporting

Requirements By

Date

Contracts By

BellSouth

Business Unit

Financial Report

By Period

Upcoming Termination Report

Agreement Type

Period Covered By Report:

Start Date

End Date

OR

Time Period

Search

Cancel

FIG. 134

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory Product Inventory

Marketing Contracts/Agreements Searching/Reporting Contacts

<p><u>Contract/Agreements Module</u></p> <p><u>Add Contract/Agreement</u></p> <p><u>Search</u></p> <p><u>Contracts/Agreements</u></p> <p><u>Contract Reports</u></p> <p><u>Upcoming</u></p> <p><u>Termination</u></p> <p><u>Report</u></p> <p><u>Royalty/Reporting</u></p> <p><u>Requirements By</u></p> <p><u>Date</u></p> <p><u>Contracts By</u></p> <p><u>BellSouth</u></p> <p><u>Business Unit</u></p> <p><u>Financial Report</u></p> <p><u>By Period</u></p>	<p><u>Royalty/Reporting Requirements By Date Report</u></p> <p>Agreement Type <input type="text"/></p> <p>Period Covered By Report:</p> <p>Start Date <input type="text"/> End Date <input type="text"/></p> <p>OR</p> <p>Time Period <input type="text"/></p> <p><input type="button" value="Search"/> <input type="button" value="Cancel"/></p>
---	---

FIG. 138

[illegible]

IP Product Inventory Inventory

<u>Contract/Agreement Module</u>	<u>Royalty/Reporting Requirements By Date Report</u>																
<u>Add Contract/Agreement</u>	<table><tr><td><u>Contract Name</u></td><td><u>Expected Action Due Date</u></td><td><u>Actual Action Date</u></td><td><u>Action Type</u></td><td><u>Expected Amount</u></td><td><u>Actual Amount</u></td><td><u>Expected Action Date</u></td><td><u>Actual Action Date</u></td></tr><tr><td>Data</td><td>Data</td><td>Data</td><td>Data</td><td>Data</td><td>Data</td><td>Data</td><td>Data</td></tr></table>	<u>Contract Name</u>	<u>Expected Action Due Date</u>	<u>Actual Action Date</u>	<u>Action Type</u>	<u>Expected Amount</u>	<u>Actual Amount</u>	<u>Expected Action Date</u>	<u>Actual Action Date</u>	Data	Data	Data	Data	Data	Data	Data	Data
<u>Contract Name</u>	<u>Expected Action Due Date</u>	<u>Actual Action Date</u>	<u>Action Type</u>	<u>Expected Amount</u>	<u>Actual Amount</u>	<u>Expected Action Date</u>	<u>Actual Action Date</u>										
Data	Data	Data	Data	Data	Data	Data	Data										
<u>Search Contracts/Agreements</u>																	
<u>Contract Reports</u>																	
<u>Upcoming Termination Report</u>																	
<u>Royalty/Reporting Requirements By Date</u>																	
<u>Contracts By</u>																	
<u>BellSouth Business Unit</u>																	
<u>Financial Report By</u>																	
<u>Period</u>																	
<u>Financial Report By</u>																	
<u>BellSouth Business Unit</u>																	

FIG. 139

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP Inventory](#)
[Product Inventory](#)
[Marketing Contracts/Agreements](#)
[Searching/Reporting Contracts](#)

Contract/Agreements Module	Contracts By BellSouth Business Unit
Add Contract/Agreement	Agreement Type <input type="text"/>
Search Contracts/Agreements	BellSouth Business Unit <input type="text"/>
Contract Reports	Period Covered By Report:
Upcoming Termination Report	Start Date <input type="text"/>
Royalty/Reporting Requirements By Date	OR
Contracts By BellSouth Business Unit	End Date <input type="text"/>
Financial Report By Period	Time Period <input type="text"/>
Financial Report By BellSouth Business Unit	<input type="button" value="Search"/> <input type="button" value="Cancel"/>
Action Report	

FIG. 140

[illegible]

<u>IP</u> Inventory	<u>Product</u> Inventory
100	100
200	200
300	300
400	400
500	500
600	600
700	700
800	800
900	900
1000	1000

<u>Contract/Agreement Module</u>	<u>Contracts By BellSouth Business Unit</u>
<u>Add Contract/Agreement</u>	<u>Period Covered By Report:</u> <u>Date Report Run:</u>
<u>Search Contracts/Agreements</u>	
<u>Contract Reports</u>	
<u>Upcoming Termination Report</u>	<u>BellSouth Business Unit</u> <u>Agreement Name</u> <u>Product</u> <u>Parties</u> <u>Effective Date</u> <u>Termination Date</u>
<u>Royalty/Reporting Requirements By Date</u>	<u>Data</u> <u>Data</u> <u>Data</u> <u>Data</u> <u>Data</u> <u>Data</u>
<u>Contracts By BellSouth Business Unit</u>	
<u>Financial Report By Period</u>	
<u>Financial Report By BellSouth Business Unit</u>	
<u>Action Report</u>	

FIG. 141

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts
Inventory Inventory

<u>Contract/Agreements</u> <u>Module</u>	<u>Financial Report By Period</u>
<u>Add Contract/Agreement</u> <u>Search</u> <u>Contracts/Agreements</u> <u>Contract Reports</u> <u>Upcoming</u> <u>Termination</u> <u>Report</u> <u>Royalty/Reporting</u> <u>Requirements By</u> <u>Date</u> <u>Contracts By</u> <u>BellSouth</u> <u>Business Unit</u> <u>Financial Report</u> <u>By Period</u>	<u>Agreement Type</u> <input type="text"/> <u>Period Covered By Report:</u> <u>Start Date</u> <input type="text"/> <u>End Date</u> <input type="text"/> OR <u>Time Period</u> <input type="text"/> <input type="button" value="Search"/> <input type="button" value="Cancel"/>

FIG. 142

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts
Inventory Inventory

<u>Contract/Agreement Module</u>	<u>Financial Report By Period</u>												
<u>Add Contract/Agreement</u>	<u>Period Covered By Report:</u> <u>Date Report Run:</u>												
<u>Search Contracts/Agreements</u>													
<u>Contract Reports</u>	<table><tr><td><u>Contract Name</u></td><td><u>BellSouth Business Unit</u></td><td><u>Parties</u></td><td><u>Amount Due</u></td><td><u>Date Due</u></td><td><u>External Contact</u></td></tr><tr><td>Data</td><td>Data</td><td>Data</td><td>Data</td><td>Data</td><td>Data</td></tr></table>	<u>Contract Name</u>	<u>BellSouth Business Unit</u>	<u>Parties</u>	<u>Amount Due</u>	<u>Date Due</u>	<u>External Contact</u>	Data	Data	Data	Data	Data	Data
<u>Contract Name</u>	<u>BellSouth Business Unit</u>	<u>Parties</u>	<u>Amount Due</u>	<u>Date Due</u>	<u>External Contact</u>								
Data	Data	Data	Data	Data	Data								
<u>Upcoming Termination Report</u>													
<u>Royalty/Reporting Requirements By Date</u>													
<u>Contracts By BellSouth Business Unit</u>													
<u>Financial Report By Period</u>													
<u>Financial Report By BellSouth Business Unit</u>													
<u>Action Report</u>													

FIG. 143

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts
Inventory Inventory

<u>Contract/Agreements</u> <u>Module</u>	<u>Financial Report By BellSouth Business Unit</u>
<u>Add Contract/Agreement</u>	<u>Agreement Type</u> <input type="text" value="BellSouth BU"/>
<u>Search Contracts/Agreements</u>	<u>Period Covered By Report:</u>
<u>Contract Reports</u>	<u>Start Date</u> <input type="text" value=""/> <u>End Date</u> <input type="text" value=""/>
<u>Upcoming Termination</u> <u>Report</u>	OR
<u>Royalty/Reporting</u> <u>Requirements By Date</u>	<u>Time Period</u> <input type="text" value=""/>
<u>Contracts By BellSouth</u> <u>Business Unit</u>	<input type="button" value="Search"/> <input type="button" value="Cancel"/>
<u>Financial Report By</u> <u>Period</u>	
<u>Financial Report By</u> <u>BellSouth Business Unit</u>	
<u>Action Report</u>	
<u>Party Report</u>	

FIG. 144

[illegible][illegible][illegible][illegible]

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contracts
Inventory Inventory

<u>Contract/Agreement Module</u>	<u>Action Report</u>
<u>Add Contract/Agreement</u>	<u>Agreement Type</u> <input type="text"/>
<u>Search Contracts/Agreements</u>	<u>Action Type</u> <input type="text"/>
<u>Contract Reports</u>	<u>Period Covered By Report:</u>
<u>Upcoming Termination Report</u>	<u>Start Date</u> <input type="text"/> <u>End Date</u> <input type="text"/>
<u>Royalty/Reporting</u>	OR
<u>Requirements By Date</u>	<u>Time Period</u> <input type="text"/>
<u>Contracts By BellSouth Business Unit</u>	<u>Sort By:</u>
<u>Financial Report By Period</u>	<u>Sort 1:</u> <input type="text"/>
<u>Financial Report By BellSouth Business Unit</u>	<u>Sort 2:</u> <input type="text"/>
<u>Action Report</u>	<u>Sort 3:</u> <input type="text"/>
	<input type="button" value="Search"/> <input type="button" value="Cancel"/>

FIG. 146

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts
Inventory Inventory

<u>Contract/Agreement Module</u>	<u>Action Report</u>
<u>Add Contract/Agreement</u>	Agreement Type <input type="text"/>
<u>Search Contracts/Agreements</u>	Action Type <input type="text"/>
<u>Contract Reports</u>	Period Covered By Report:
<u>Upcoming Termination Report</u>	Start Date <input type="text"/>
<u>Royalty/Reporting Requirements By Date</u>	OR
<u>Contracts By BellSouth Business Unit</u>	Time Period <input type="text"/>
<u>Financial Report By Period</u>	Sort By:
<u>Financial Report By BellSouth Business Unit</u>	Sort 1: <input type="text"/>
<u>Action Report</u>	Sort 2: <input type="text"/>
	Sort 3: <input type="text"/>
	Search <input type="text"/>
	Internal Responsible Party External Responsible Party Due Date Contract Name

FIG. 147

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product
Inventory Inventory Marketing Contracts/Agreements Searching/Reporting Contacts

<u>Contract/Agreement Module</u>	<u>Action Report</u>
<u>Add Contract/Agreement</u> <u>Search</u> <u>Contracts/Agreements</u> <u>Contract Reports</u> <u>Upcoming</u> <u>Termination</u> <u>Report</u> <u>Royalty/Reporting</u> <u>Requirements By</u> <u>Date</u> <u>Contracts By</u> <u>BellSouth</u> <u>Business Unit</u> <u>Financial Report</u> <u>By Period</u>	<p>Period Covered By Report: Date Report Run:</p> <p> <u>Expected Agreement</u> <u>Action</u> <u>Expected</u> <u>Expected</u> <u>Internal</u> <u>External</u> <u>Due Date</u> <u>Name</u> <u>Type</u> <u>Action</u> <u>Amount</u> <u>Contact</u> <u>Contact</u> <u>Data</u> <u>Data</u> <u>Data</u> <u>Data</u> <u>Data</u> <u>Data</u> <u>Data</u> </p>

FIG. 148

[illegible]

IP Inventory

Party Report

Search

Agreement Type

Add Party

Parties

Period Covered By Report:

Start Date

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100	

End Date

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 115 145 175 205 235 265 295 325 355 385 415 445 475 505 535 565 595 625 655 685 715 745 775 805 835 865 895 925 955 985 1015 1045 1075 1105 1135 1165 1195 1225 1255 1285 1315 1345 1375 1405 1435 1465 1495 1525 1555 1585 1615 1645 1675 1705 1735 1765 1795 1825 1855 1885 1915 1945 1975 2005 2035 2065 2095 2125 2155 2185 2215 2245 2275 2305 2335 2365 2395 2425 2455 2485 2515 2545 2575 2605 2635 2665 2695 2725 2755 2785 2815 2845 2875 2905 2935 2965 2995 3025 3055 3085 3115 3145 3175 3205 3235 3265 3295 3325 3355 3385 3415 3445 3475 3505 3535 3565 3595 3625 3655 3685 3715 3745 3775 3805 3835 3865 3895 3925 3955 3985 4015 4045 4075 4105 4135 4165 4195 4225 4255 4285 4315 4345 4375 4405 4435 4465 4495 4525 4555 4585 4615 4645 4675 4705 4735 4765 4795 4825 4855 4885 4915 4945 4975 5005 5035 5065 5095 5125 5155 5185 5215 5245 5275 5305 5335 5365 5395 5425 5455 5485 5515 5545 5575 5605 5635 5665 5695 5725 5755 5785 5815 5845 5875 5905 5935 5965 5995 6025 6055 6085 6115 6145 6175 6205 6235 6265 6295 6325 6355 6385 6415 6445 6475 6505 6535 6565 6595 6625 6655 6685 6715 6745 6775 6805 6835 6865 6895 6925 6955 6985 7015 7045 7075 7105 7135 7165 7195 7225 7255 7285 7315 7345 7375 7405 7435 7465 7495 7525 7555 7585 7615 7645 7675 7705 7735 7765 7795 7825 7855 7885 7915 7945 7975 8005 8035 8065 8095 8125 8155 8185 8215 8245 8275 8305 8335 8365 8395 8425 8455 8485 8515 8545 8575 8605 8635 8665 8695 8725 8755 8785 8815 8845 8875 8905 8935 8965 8995 9025 9055 9085 9115 9145 9175 9205 9235 9265 9295 9325 9355 9385 9415 9445 9475 9505 9535 9565 9595 9625 9655 9685 9715 9745 9775 9805 9835 9865 9895 9925 9955 9985 10015 10045 10075 10105 10135 10165 10195 10225 10255 10285 10315 10345 10375 10405 10435 10465 10495 10525 10555 10585 10615 10645 10675 10705 10735 10765 10795 10825 10855 10885 10915 10945 10975 11005 11035 11065 11095 11125 11155 11185 11215 11245 11275 11305 11335 11365 11395 11425 11455 11485 11515 11545 11575 11605 11635 11665 11695 11725 11755 11785 11815 11845 11875 11905 11935 11965 11995 12025 12055 12085 12115 12145 12175 12205 12235 12265 12295 12325 12355 12385 12415 12445 12475 12505 12535 12565 12595 12625 12655 12685 12715 12745 12775 12805 12835 12865 12895 12925 12955 12985 13015 13045 13075 13105 13135 13165 13195 13225 13255 13285 13315 13345 13375 13405 13435 13465 13495 13525 13555 13585 13615 13645 13675 13705 13735 13765 13795 13825 13855 13885 13915 13945 13975 14005 14035 14065 14095 14125 14155 14185 14215 14245 14275 14305 14335 14365 14395 14425 14455 14485 14515 14545 14575 14605 14635 14665 14695 14725 14755 14785 14815 14845 14875 14905 14935 14965 14995 15025 15055 15085 15115 15145 15175 15205 15235 15265 15295 15325 15355 15385 15415 15445 15475 15505 15535 15565 15595 15625 15655 15685 15715 15745 15775 15805 15835 15865 15895 15925 15955 15985 16015 16045 16075 16105 16135 16165 16195 16225 16255 16285 16315 16345 16375 16405 16435 16465 16495 16525 16555 16585 16615 16645 16675 16705 16735 16765 16795 16825 16855 16885 16915 16945 16975 17005 17035 17065 17095 17125 17155 17185 17215 17245 17275 17305 17335 17365 17395 17425 17455 17485 17515 17545 17575 17605 17635 17665 17695 17725 17755 17785 17815 17845 17875 17905 17935 17965 17995 18025 18055 18085 18115 18145 18175 18205 18235 18265 18295 18325 18355 18385 18415 18445 18475 18505 18535 18565 18595 18625 18655 18685 18715 18745 18775 18805 18835 18865 18895 18925 18955 18985 19015 19045 19075 19105 19135 19165 19195 19225 19255 19285 19315 19345 19375 19405 19435 19465 19495 19525 19555 19585 19615 19645 19675 19705 19735 19765 19795 19825 19855 19885 19915 19945 19975 20005 20035 20065 20095 20125 20155 20185 20215 20245 20275 20305 20335 20365 20395 20425 20455 20485 20515 20545 20575 20605 20635 20665 20695 20725 20755 20785 20815 20845 20875 20905 20935 20965 20995 21025 21055 21085 21115 21145 21175 21205 21235 21265 21295 21325 21355 21385 21415 21445 21475 21505 21535 21565 21595 21625 21655 21685 21715 21745 21775 21805 21835 21865 21895 21925 21955 21985 22015 22045 22075 22105 22135 22165 22195 2

Search

Caricel

FIG. 149

[illegible]

IP Product
Inventory Inventory

<u>Contract/Agreements Module</u>	<u>Party Report</u>
<u>Add Contract/Agreement</u>	<u>Period Covered By Report:</u>
<u>Search</u>	<u>Date Report Run:</u>
<u>Contracts/Agreements</u>	
<u>Contract Reports</u>	<u>Parties</u>
<u>Upcoming</u>	<u>Data</u>
<u>Termination Report</u>	<u>Agreement Name</u>
<u>Royalty/Reporting</u>	<u>BellSouth Business Unit</u>
<u>Requirements By</u>	<u>Amount Due</u>
<u>Date</u>	<u>Date Due</u>
<u>Contracts By</u>	<u>Data</u>
<u>BellSouth Business</u>	<u>External Contact</u>
<u>Unit</u>	<u>Data</u>
<u>Financial Report By</u>	
<u>Period</u>	

FIG. 150

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory Product Inventory Marketing Contracts/Agreements Searching/Reporting Contacts

Searching/Reporting Module

Contract Reports

Upcoming Termination Report

Royalty/Reporting

Requirements By Date

Contracts By BellSouth Entity

Report

Financial Report By Period

Financial Report By BellSouth

Entity

Action Report

Party Report

Standard Project Reports

Top Deals

Customer Report

Remarketing Report

Status Level Report

BellSouth Entity Report

Cross Module Searching

FIG. 151

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts
Inventory Inventory

<u>Reporting Module</u>	<u>Cross Module Searching</u>
<u>Contract Reports</u> <u>Upcoming</u> <u>Termination</u> <u>Report</u> <u>Royalty/Reporting</u> <u>Requirements By</u> <u>Date</u> <u>Contracts By</u> <u>BellSouth Entity</u> <u>Report</u> <u>Financial Report</u> <u>By Period</u> <u>Financial Report</u> <u>By BellSouth</u> <u>Entity</u>	<u>Output Display:</u> <div>Item1</div> <div>Item2</div> <div>Item3</div> <div>Item4</div> <div>Item5</div> <u>Where:</u> <div>Criteria 1</div> <div>Criteria 2</div> <div>Operator and</div> <div>Search</div> <div>Cancel</div>

FIG. 152

U.S. Pat. & Tm. Off. Reg. No. 100,000,000

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts
Inventory Inventory

<u>Reporting Module</u>	<u>Cross Module Searching</u>
<u>Contract Reports</u> <u>Upcoming</u> <u>Termination</u> <u>Report</u> <u>Royalty/Reporting</u> <u>Requirements By</u> <u>Date</u> <u>Contracts By</u> <u>BellSouth Entity</u> <u>Report</u> <u>Financial Report</u> <u>By Period</u> <u>Financial Report</u> <u>By BellSouth</u> <u>Entity</u>	<u>Output Display:</u> Item1 Patents Item2 Trademarks Item3 Trade Secrets Item4 Copyrights Item5 . <u>Where:</u> Patents Trademarks Trade Secrets Copyrights Products Marketing Opportunities Contracts <u>Operator</u> <u>Search</u> <u>Cancel</u>

FIG. 153

[illegible]

IP Product
Inventory Inventory

<u>Reporting Module</u>		<u>Cross Module Searching</u>	
<u>Contract Reports</u>		<u>Output Display:</u>	
<u>Upcoming</u>	Item1	Patents	Patent App#
<u>Termination</u>	Item2	Trademarks	Patent Docket #
<u>Report</u>	Item3	Trade Secrets	Trademark Name
<u>Royalty/Reporting</u>	Item4	Copyrights	Trademark Application #
<u>Requirements By</u>	Item5	Products	Trademark Docket #
<u>Date</u>			Trade Secret Name
<u>Contracts By</u>			Copyright Name
<u>BellSouth Entity</u>			BellSouth Entity
<u>Report</u>			Product Name
<u>Financial Report</u>			BellSouth Business Unit
<u>By Period</u>		Criteria 1	=
<u>Financial Report</u>		Criteria 2	=
<u>By BellSouth</u>		Operator and	
<u>Entity</u>			
<u>Search</u>		<u>Cancel</u>	

FIG. 154

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts
Inventory Inventory

<u>Reporting Module</u>		<u>Cross Module Searching</u>																																													
<u>Contract Reports</u> <u>Upcoming</u> <u>Termination</u> <u>Report</u> <u>Royalty/Reporting</u> <u>Requirements By</u> <u>Date</u> <u>Contracts By</u> <u>BellSouth Entity</u> <u>Report</u> <u>Financial Report</u> <u>By Period</u> <u>Financial Report</u> <u>By BellSouth</u> <u>Entity</u>		<u>Output Display:</u> <table border="1"> <tr> <td>Item1</td> <td>Patents</td> <td>Trademark Application #</td> </tr> <tr> <td>Item2</td> <td>Trademarks</td> <td>Trademark Docket #</td> </tr> <tr> <td>Item3</td> <td>Trade Secrets</td> <td>Trade Secret Name</td> </tr> <tr> <td>Item4</td> <td>Copyrights</td> <td>Copyright Name</td> </tr> <tr> <td>Item5</td> <td>Products</td> <td>BellSouth Entity</td> </tr> <tr> <td></td> <td></td> <td>Product Name</td> </tr> <tr> <td></td> <td></td> <td>BellSouth Business Unit</td> </tr> <tr> <td></td> <td></td> <td>Contacts</td> </tr> <tr> <td></td> <td></td> <td>Opportunity Name</td> </tr> <tr> <td></td> <td></td> <td>Agreement Name</td> </tr> <tr> <td></td> <td></td> <td>Agreement Type</td> </tr> <tr> <td></td> <td></td> <td>BellSouth Business Unit</td> </tr> </table> <u>Where:</u> <table border="1"> <tr> <td></td> <td>Criteria 1</td> <td></td> </tr> <tr> <td>Operator and</td> <td>Criteria 2</td> <td></td> </tr> </table> <table border="1"> <tr> <td>Search</td> <td>Cancel</td> </tr> </table>		Item1	Patents	Trademark Application #	Item2	Trademarks	Trademark Docket #	Item3	Trade Secrets	Trade Secret Name	Item4	Copyrights	Copyright Name	Item5	Products	BellSouth Entity			Product Name			BellSouth Business Unit			Contacts			Opportunity Name			Agreement Name			Agreement Type			BellSouth Business Unit		Criteria 1		Operator and	Criteria 2		Search	Cancel
Item1	Patents	Trademark Application #																																													
Item2	Trademarks	Trademark Docket #																																													
Item3	Trade Secrets	Trade Secret Name																																													
Item4	Copyrights	Copyright Name																																													
Item5	Products	BellSouth Entity																																													
		Product Name																																													
		BellSouth Business Unit																																													
		Contacts																																													
		Opportunity Name																																													
		Agreement Name																																													
		Agreement Type																																													
		BellSouth Business Unit																																													
	Criteria 1																																														
Operator and	Criteria 2																																														
Search	Cancel																																														

FIG. 155

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts
Inventory Inventory

<u>Reporting Module</u>	<u>Cross Module Searching</u>
<u>Contract Reports</u>	<u>Marketing</u>
<u>Upcoming Termination</u>	<u>Name</u>
<u>Report</u>	<u>Customer</u>
<u>Royalty/Reporting</u>	<u>Data</u>
<u>Requirements By Date</u>	<u>Data</u>
<u>Contracts By BellSouth</u>	<u>Contracts</u>
<u>Entity Report</u>	<u>Name</u>
<u>Financial Report By</u>	<u>Parties</u>
<u>Period</u>	<u>Data</u>
<u>Financial Report By</u>	
<u>BellSouth Entity</u>	
<u>Action Report</u>	
<u>Party Report</u>	
<u>Standard Project</u>	
<u>Reports</u>	
<u>Top Deals</u>	

FIG. 156

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts
Inventory Inventory

<u>View/Edit</u> <u>Contacts</u>	<u>View/Edit Contact</u> <div>Search for Contact</div> <div>Add Contact</div>
-------------------------------------	--

FIG. 157

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP Inventory](#) [Product Inventory](#) [Marketing Contracts/Agreements](#) [Searching/Reporting Contacts](#)

Create Contacts	Search for Contacts								
View/Edit Contacts	<div>Company Name <input type="text"/></div> <div>BellSouth Sub-entity <input type="text"/></div> <div>Type <input type="text" value="N/A"/></div> <div>Events</div> <table><tr><td>Date</td><td>Comments</td><td>Attached Files</td></tr><tr><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td></tr></table> <div>Add Event Remove Event</div> <div>Contacts</div>			Date	Comments	Attached Files	<input type="text"/>	<input type="text"/>	<input type="text"/>
Date	Comments	Attached Files							
<input type="text"/>	<input type="text"/>	<input type="text"/>							

FIG. 158

<u>Contacts</u>			
Name	Title	Country	
Address1	Address2	City	
State	Zip	Phone	
<hr/>			
<u>Individual Contact Events</u>			
Date	Comments	<u>Attached Files</u>	
Add Event		Remove Event	
<hr/>			
Search		Cancel	

FIG. 159

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

<u>IP Inventory</u>	<u>Product Inventory</u>	<u>Marketing Contracts/Agreements</u>	<u>Searching/Reporting Contacts</u>

Create Contacts View/Edit Contacts	Search for Contacts			
	Company Name Data	BellSouth Sub-entity Data Name Data	Type Data Title Data	Phone Data

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts
Inventory Inventory

View/Edit Individual Contact

Name Carter Pate Title Associate Country USA
Address1 123 Smith Address2 City New York
Ave. State NJ Zip 07000 Phone 201-596-8000

Individual Contact Events

Date	Comments	Attached Files
2/20/2000	Meeting with Tom	presentation.doc

Edit

Create Contacts

View/Edit
Contacts

FIG. 161

[illegible]

Create Contacts

[View/Edit](#)
[Contacts](#)

Add/Edit Individual Contact

Country

Name _____

Title

Address

Address1

Address2

State

Zip

Phone

Individual Contact Events

Date _____

Comments

Attached Files

Add Event

Remove Event

Submit

Cancel

FIG. 162

[illegible]

IP Product

Marketing Contracts/Agreements Searching/Reporting Contacts

Create Contacts

Company Name Company Name

BellSouth Sub-entity Entity

Type IP Group

Events

Attached Files

Comments

Contacts

Name	Title	Address1	Address2	City	State	Country	Zip	Phone	Comments
------	-------	----------	----------	------	-------	---------	-----	-------	----------

Exit

FIG. 163

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts
Inventory Inventory

<u>Create Contacts</u>	<u>Add/Edit Contact</u>						
<u>View/Edit Contacts</u>	<div>Company Name <input type="text"/></div> <div>BellSouth Sub-entity <input type="text"/></div> <div>Type <input type="text"/> IP Group <input type="text"/></div> <div>Events</div> <table border="1"><thead><tr><th>Date</th><th>Comments</th><th>Attached Files</th></tr></thead><tbody><tr><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td></tr></tbody></table> <div><input type="button" value="Add Event"/> <input type="button" value="Remove Event"/></div>	Date	Comments	Attached Files	<input type="text"/>	<input type="text"/>	<input type="text"/>
Date	Comments	Attached Files					
<input type="text"/>	<input type="text"/>	<input type="text"/>					
	<u>Contacts</u>						

FIG. 164

Contact

Name Title Address1 Address2 City State Country Zip Phone Comments

Add Contact Remove Contact

Submit Cancel

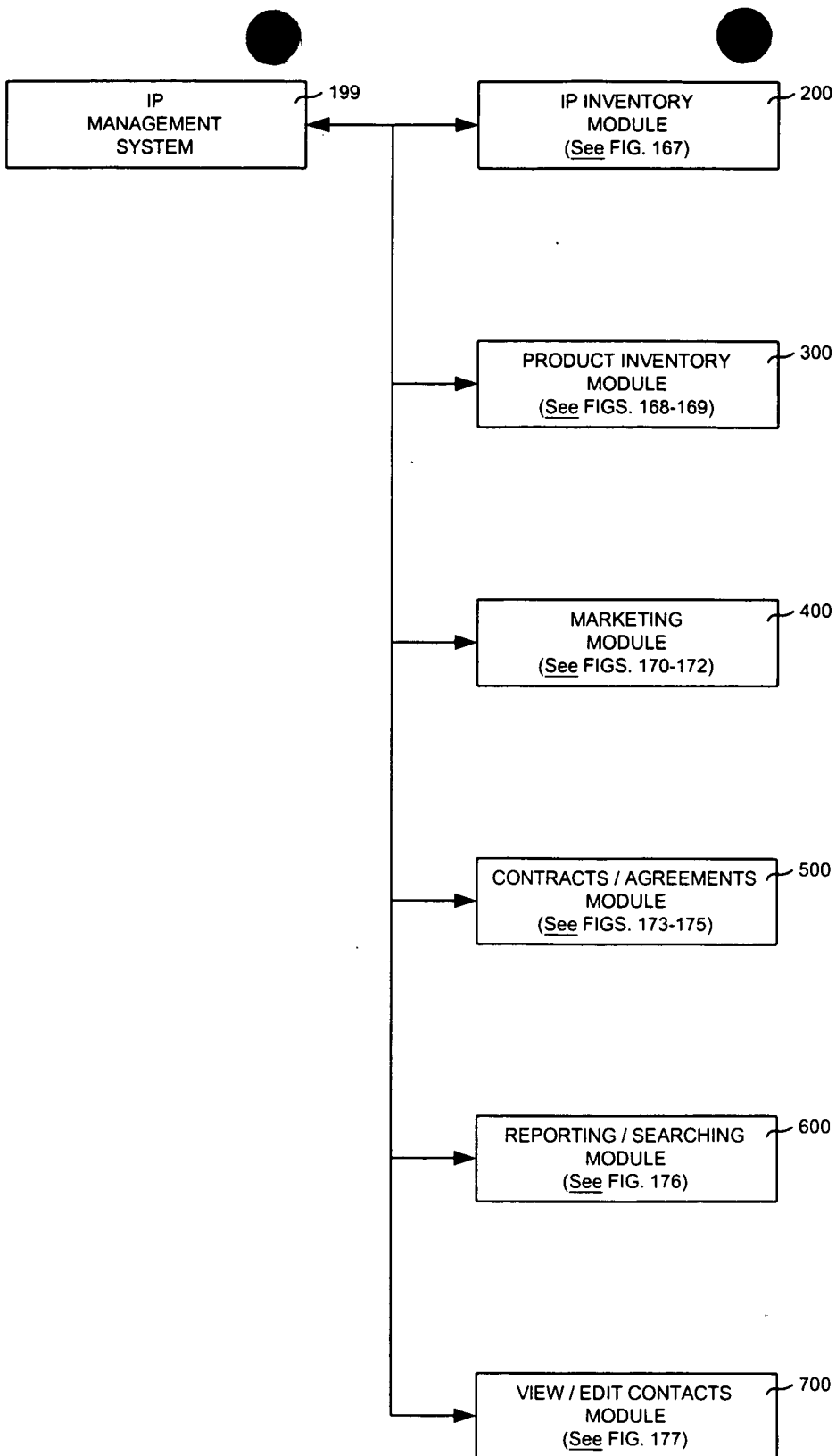


FIG. 166

FIG. 167

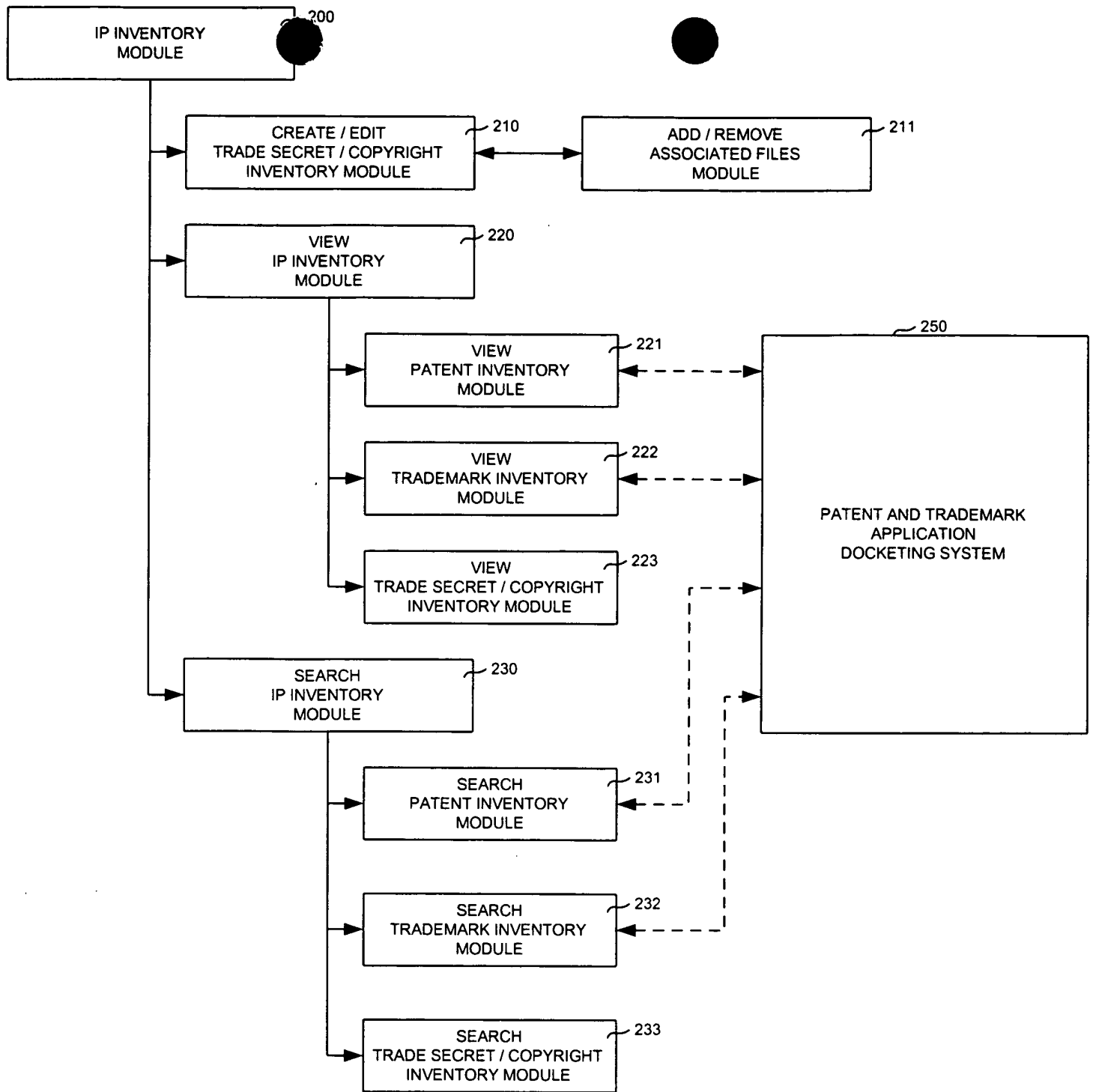


FIG. 167

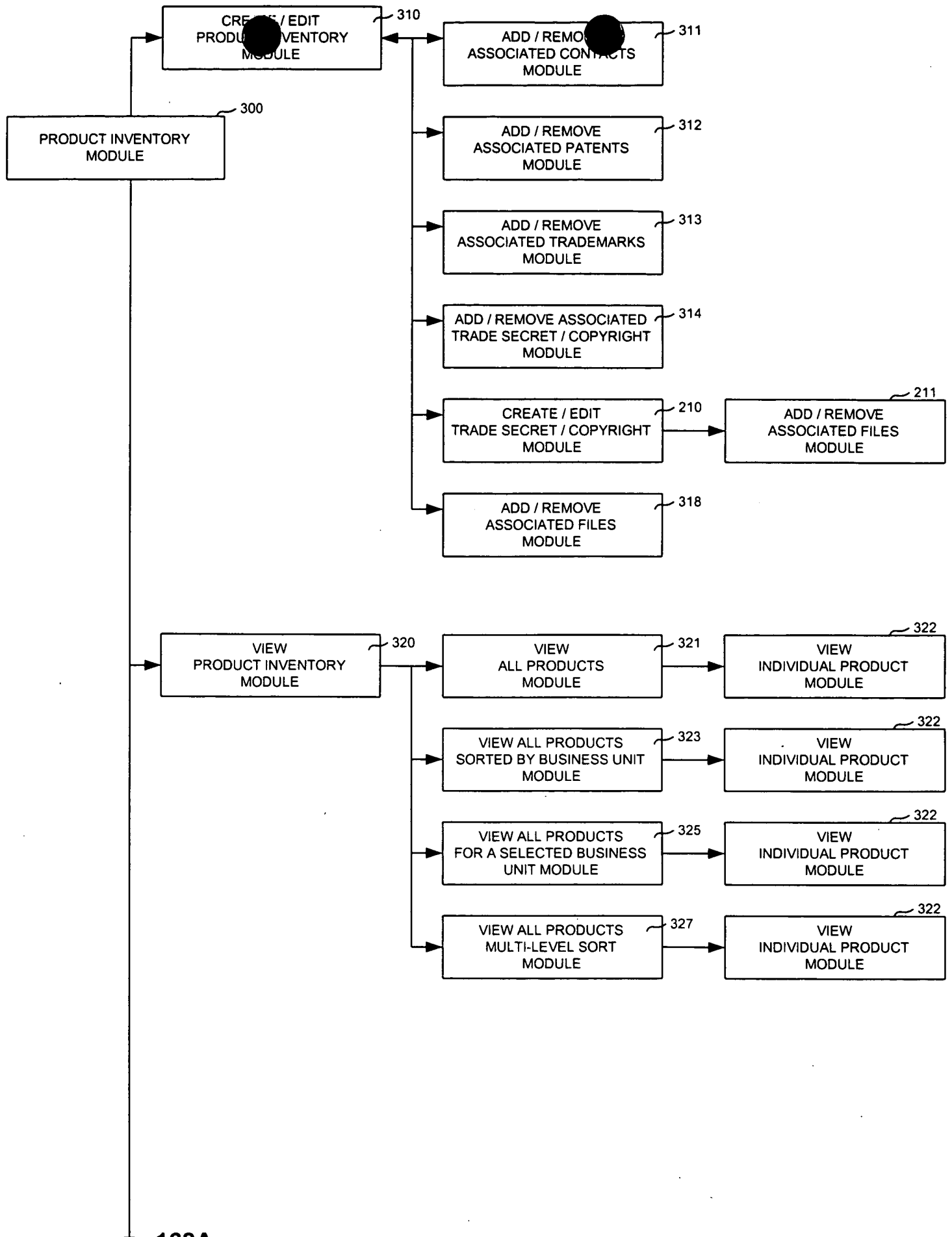


FIG. 168 □ 168A

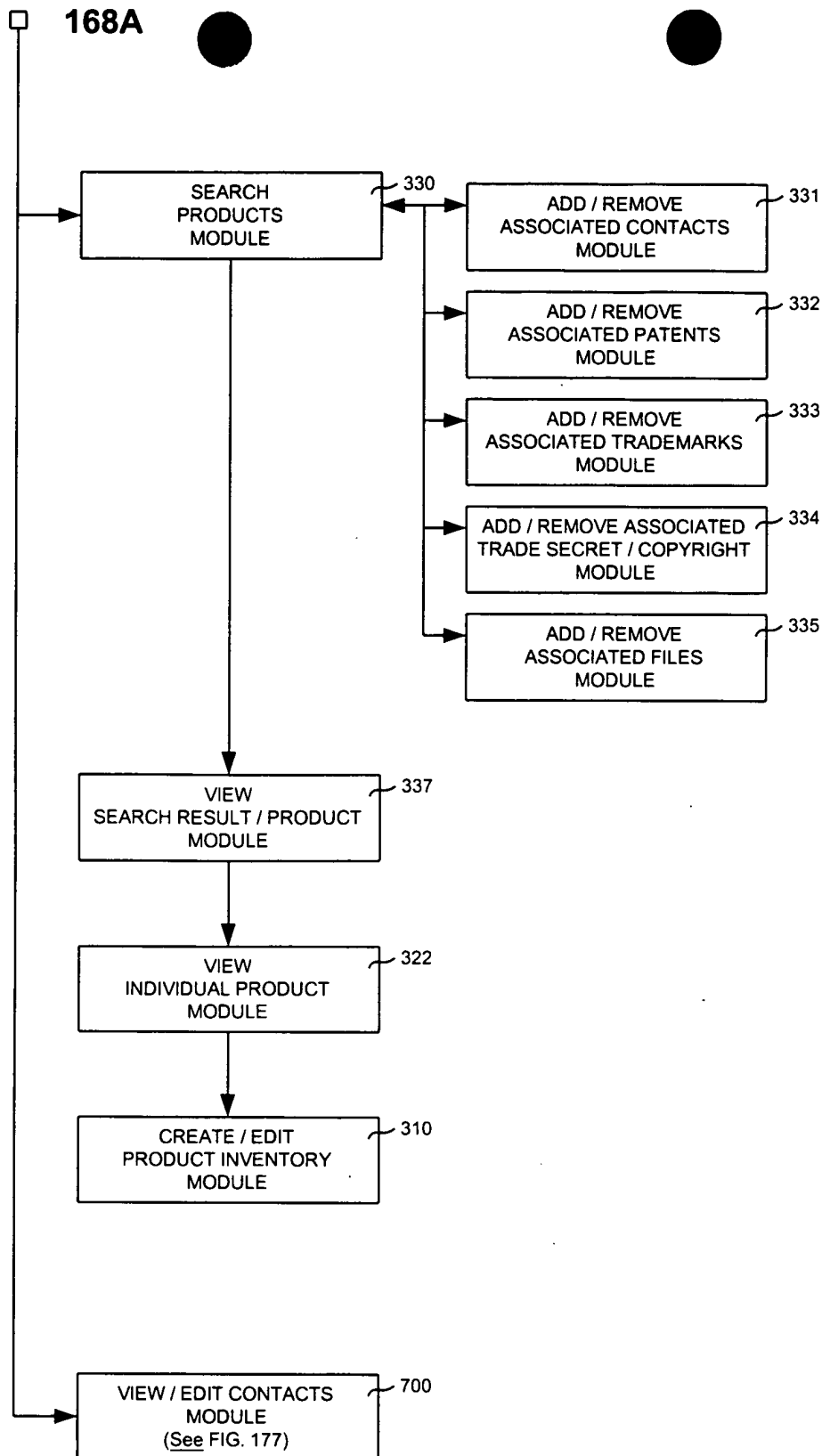


FIG. 169

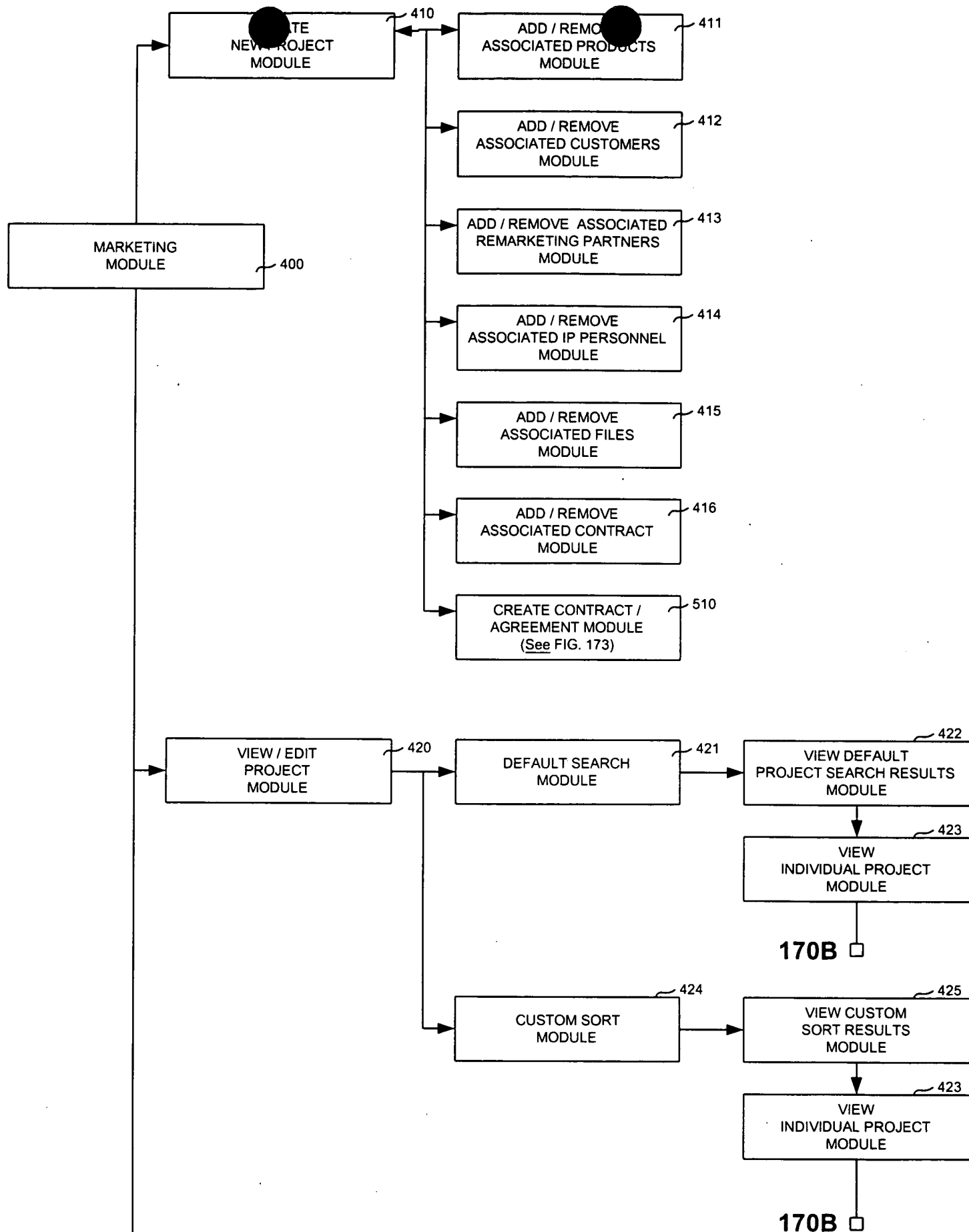


FIG. 170 170A

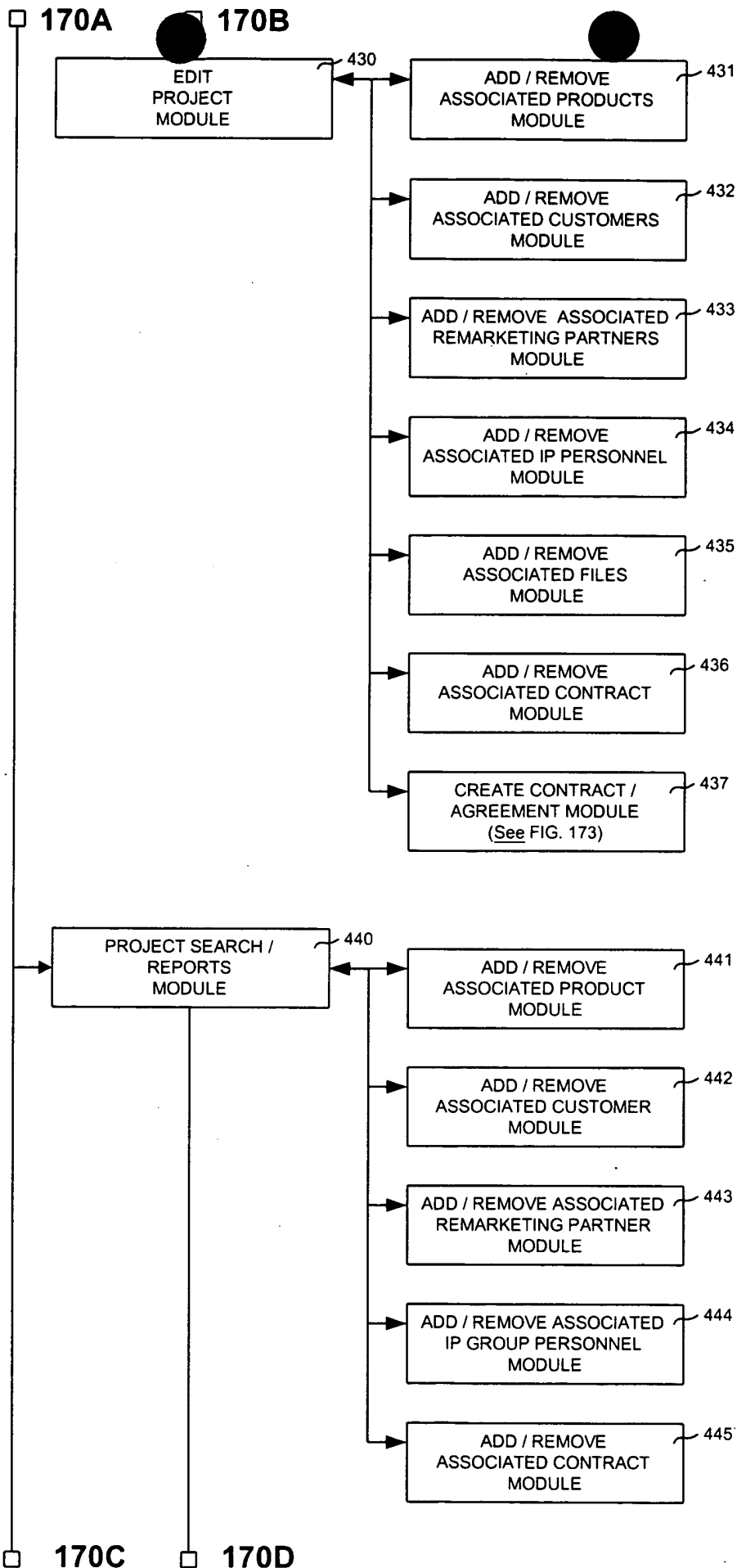


FIG. 171

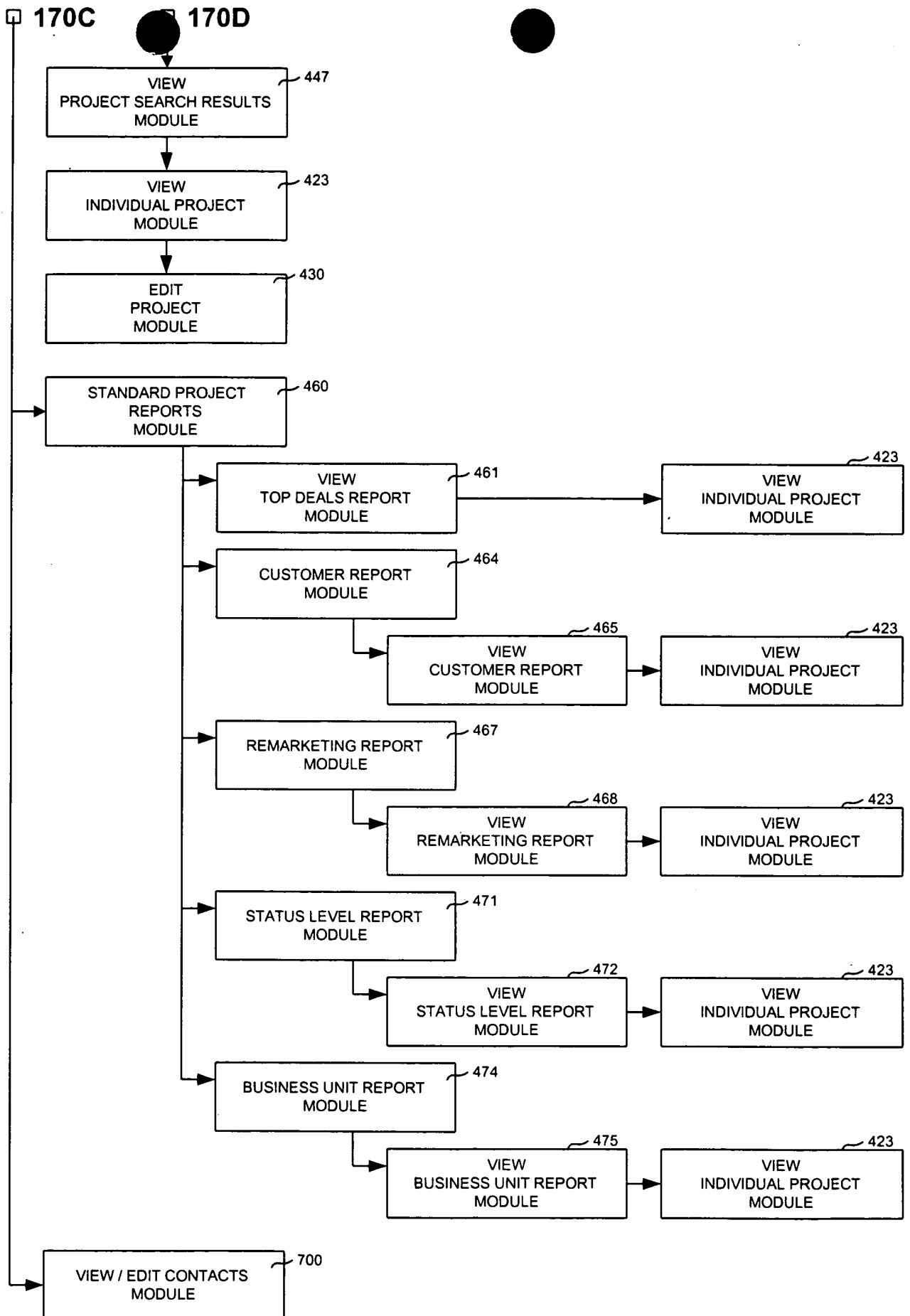
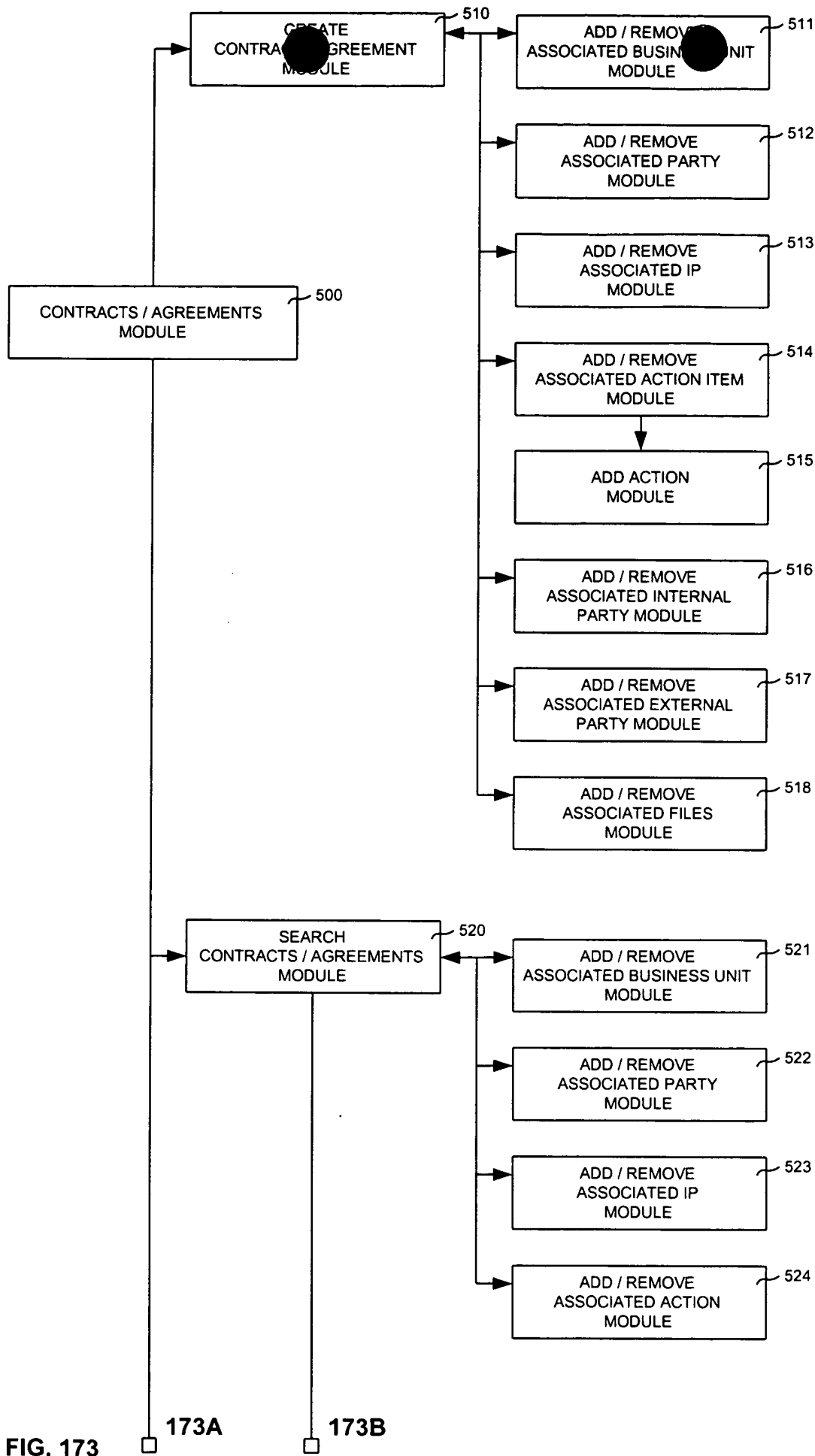


FIG. 172

FIG. 173 is a block diagram of a system architecture for managing contracts and agreements. The system is divided into two main sections, 173A and 173B, which are connected to a central module 500. Section 173A contains a 'CREATE CONTRACT / AGREEMENT MODULE' (510) and a 'CONTRACTS / AGREEMENTS MODULE' (500). Section 173B contains a 'SEARCH CONTRACTS / AGREEMENTS MODULE' (520) and a 'CONTRACTS / AGREEMENTS MODULE' (500). The 'CONTRACTS / AGREEMENTS MODULE' (500) is connected to a series of modules in section 173A: 'ADD / REMOVE ASSOCIATED BUSINESS UNIT MODULE' (511), 'ADD / REMOVE ASSOCIATED PARTY MODULE' (512), 'ADD / REMOVE ASSOCIATED IP MODULE' (513), 'ADD / REMOVE ASSOCIATED ACTION ITEM MODULE' (514), 'ADD ACTION MODULE' (515), 'ADD / REMOVE ASSOCIATED INTERNAL PARTY MODULE' (516), 'ADD / REMOVE ASSOCIATED EXTERNAL PARTY MODULE' (517), and 'ADD / REMOVE ASSOCIATED FILES MODULE' (518). The 'SEARCH CONTRACTS / AGREEMENTS MODULE' (520) is connected to a series of modules in section 173B: 'ADD / REMOVE ASSOCIATED BUSINESS UNIT MODULE' (521), 'ADD / REMOVE ASSOCIATED PARTY MODULE' (522), 'ADD / REMOVE ASSOCIATED IP MODULE' (523), and 'ADD / REMOVE ASSOCIATED ACTION MODULE' (524).



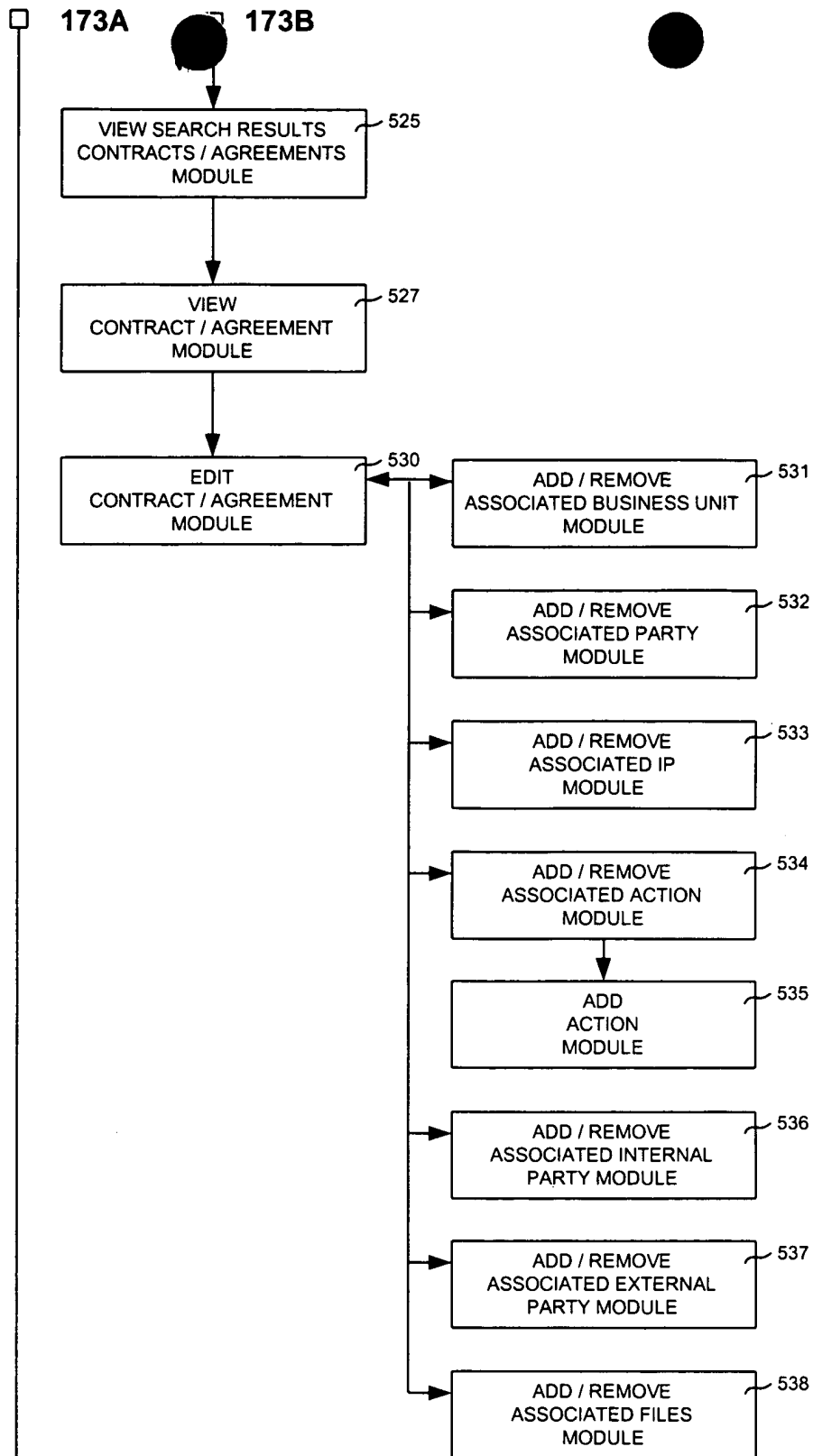


FIG. 174

173C

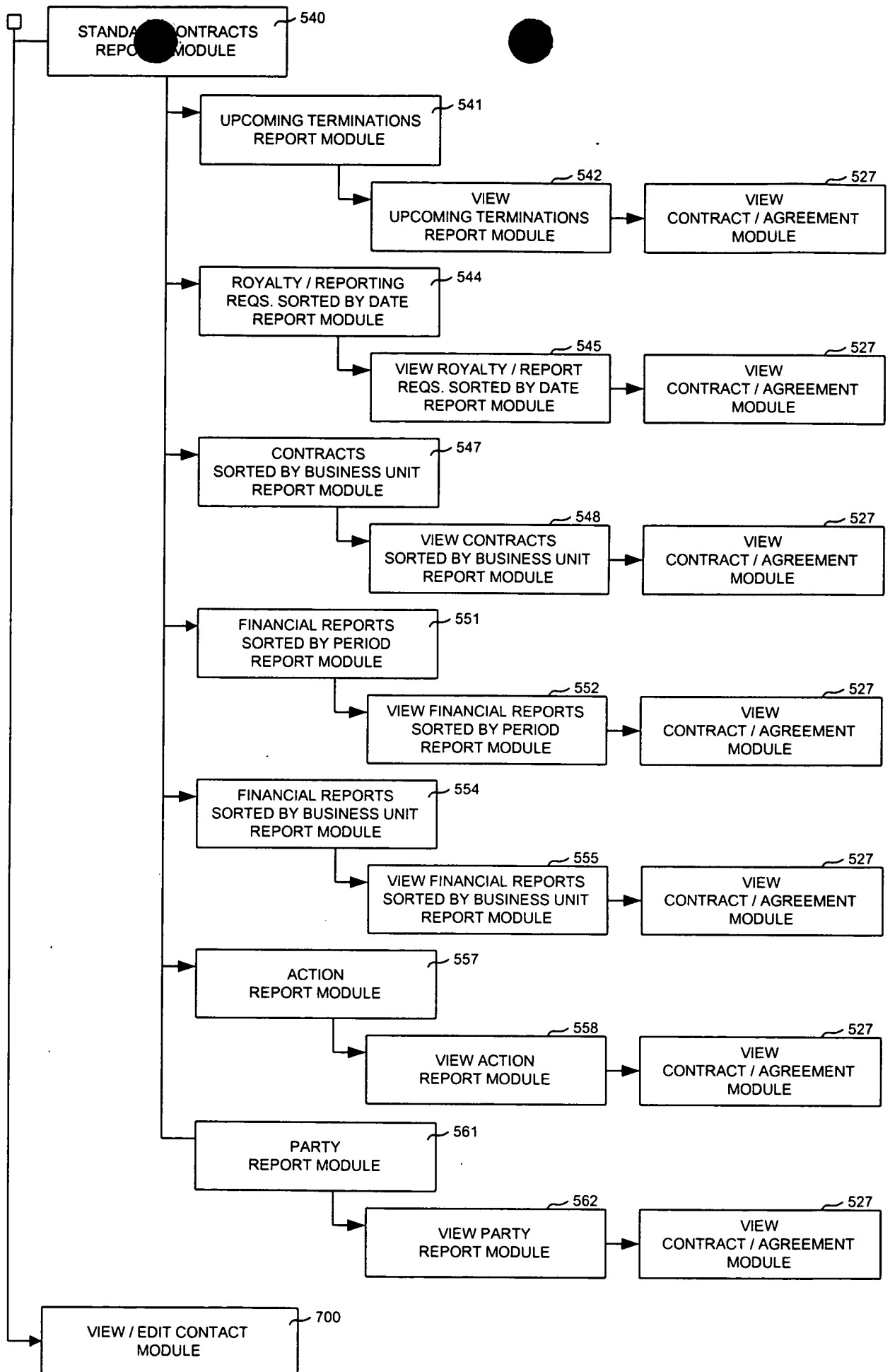


FIG. 175

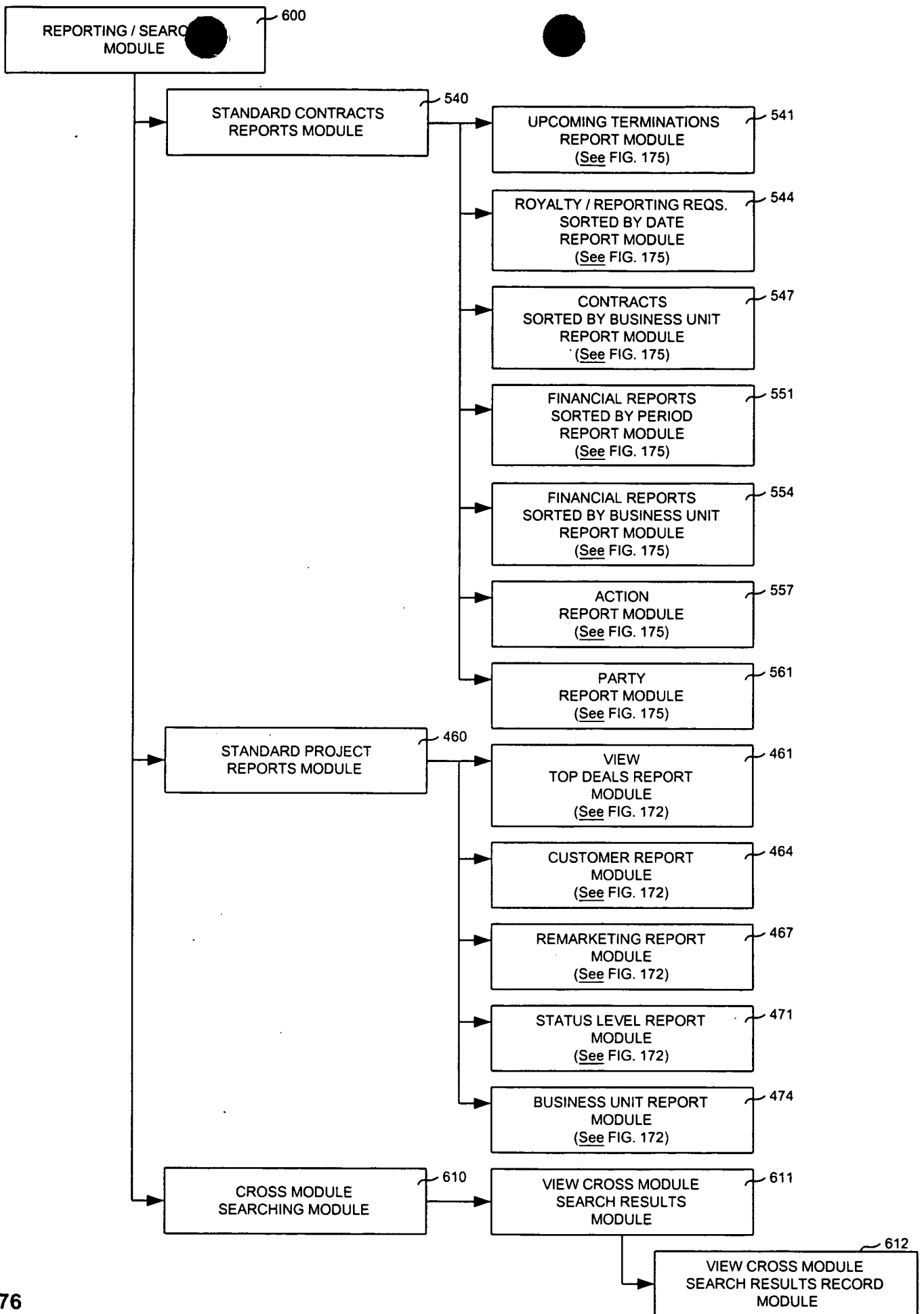


FIG. 176

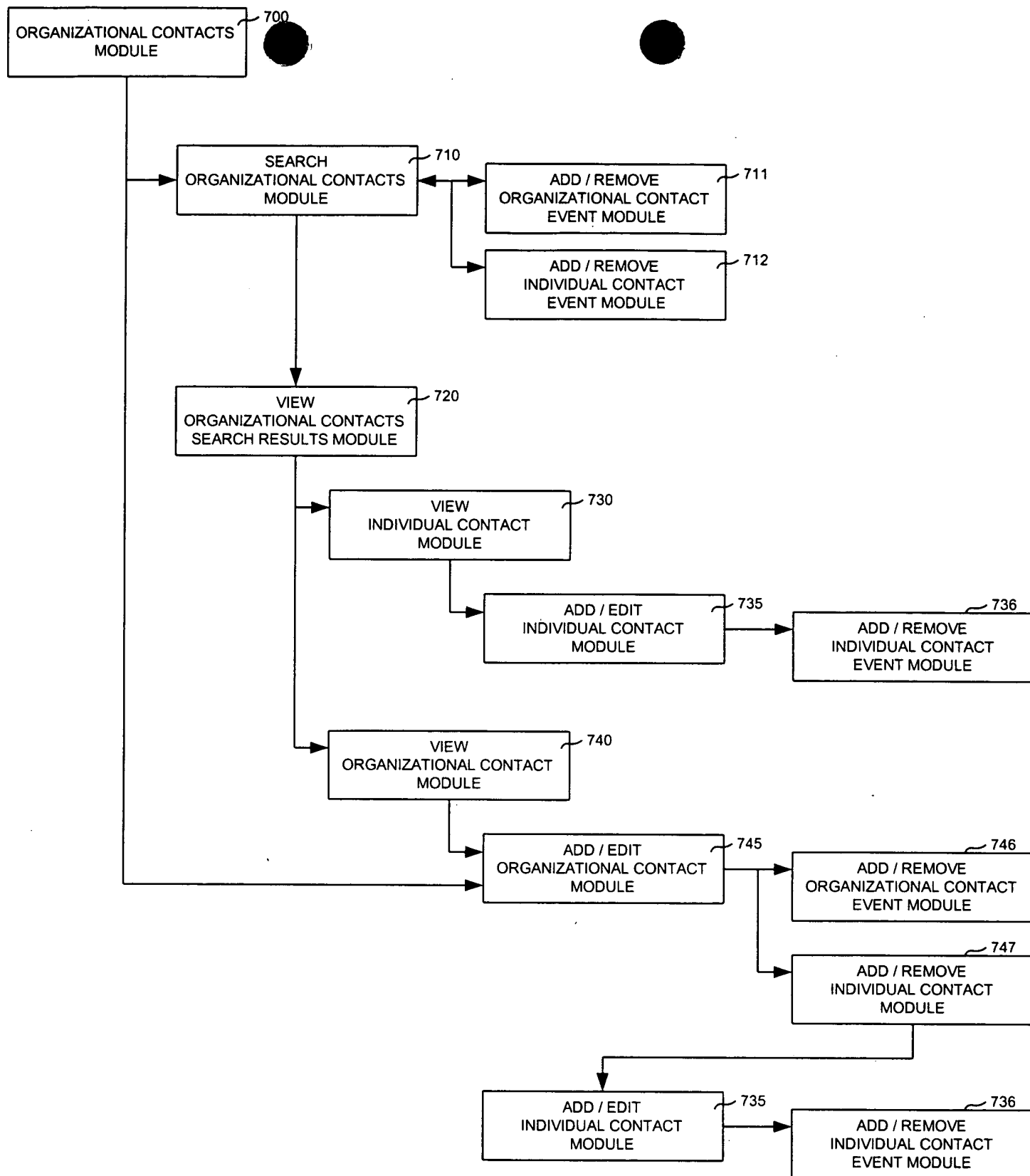


FIG. 177

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts
Inventory Inventory

<u>Contract/Agreements Module</u>	<u>Upcoming Termination Report</u>
<u>Add Contract/Agreement</u> <u>Search</u> <u>Contracts/Agreements</u> <u>Contract Reports</u> <u>Upcoming</u> <u>Termination</u> <u>Report</u> <u>Royalty/Reporting</u> <u>Requirements By</u> <u>Date</u> <u>Contracts By</u> <u>BellSouth</u> <u>Business Unit</u> <u>Financial Report</u> <u>By Period</u>	<div>Agreement Type Contract Internal Use Marketing (External) IPCO/Affiliates All</div> <div>port: End Date</div> <div>Search Cancel</div>

FIG. 135

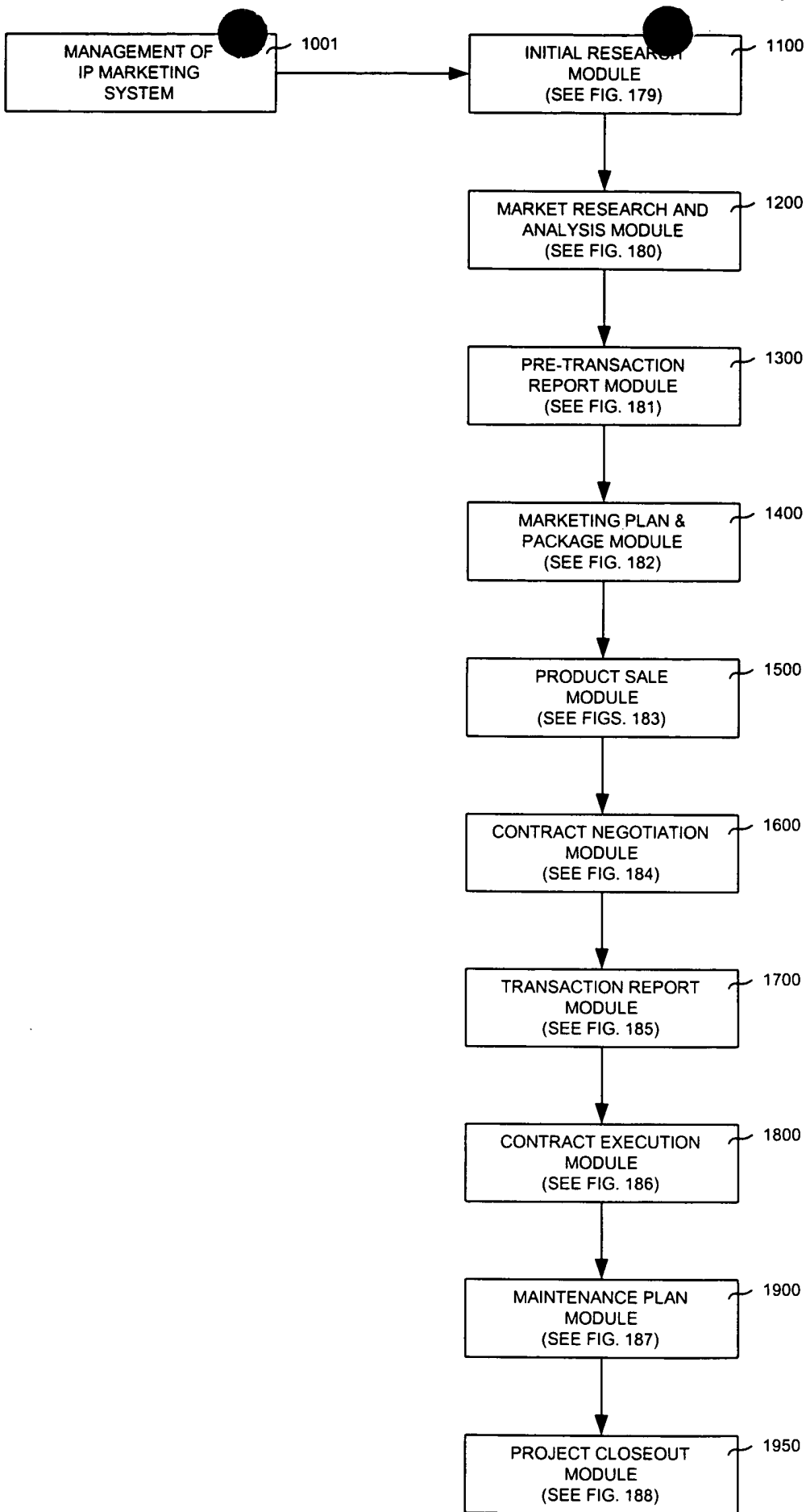


FIG. 178

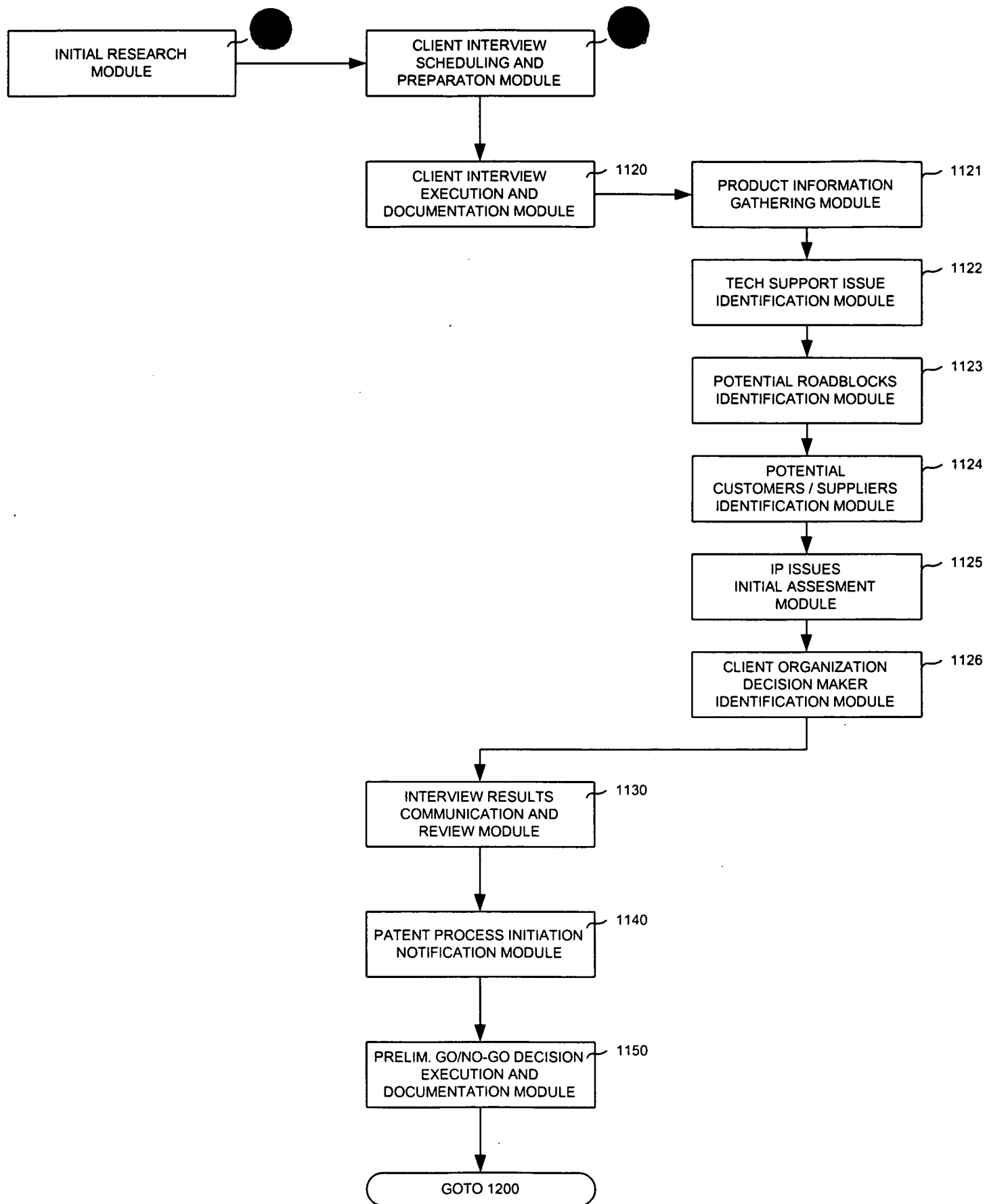


FIG. 179

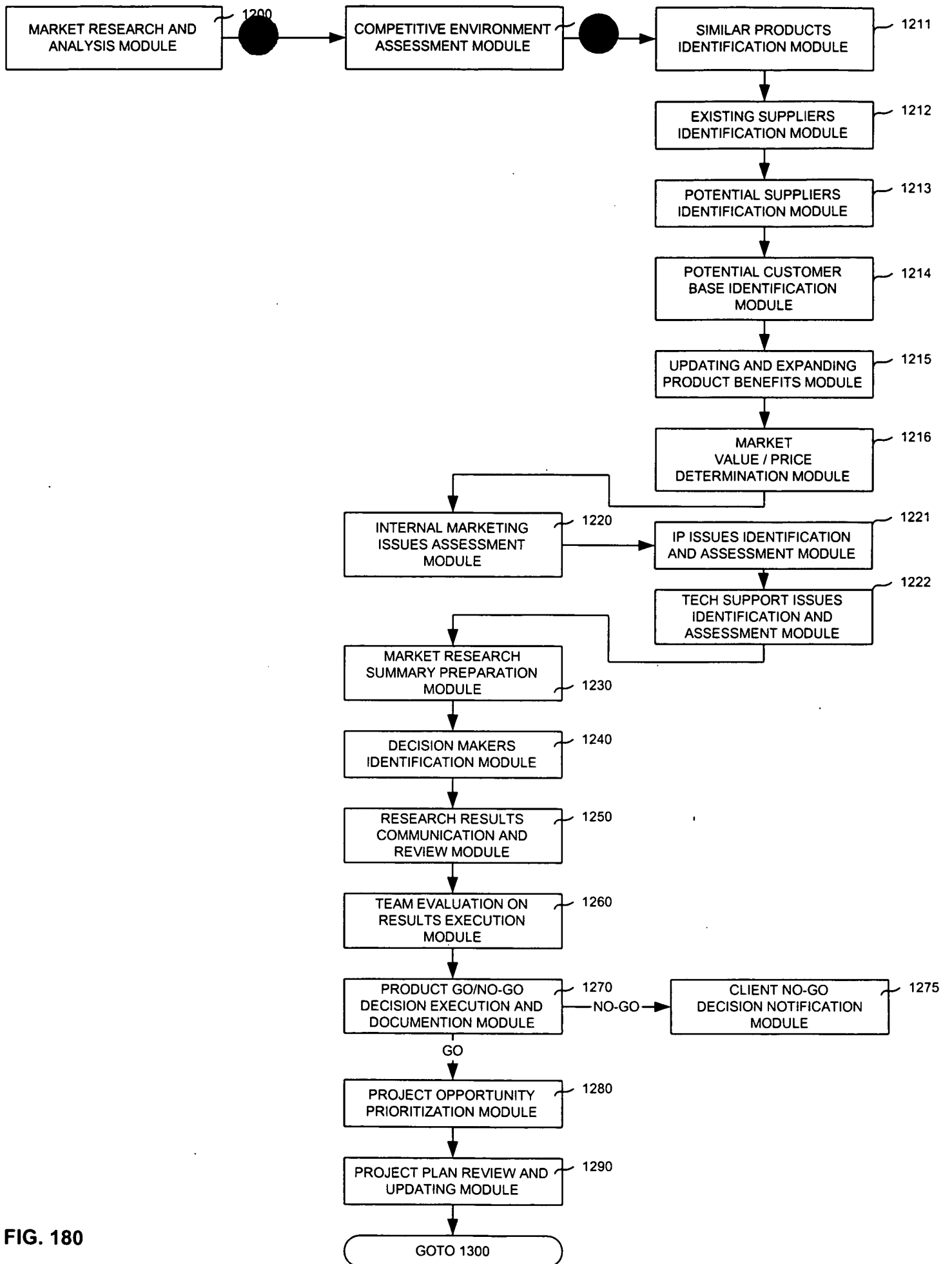


FIG. 180

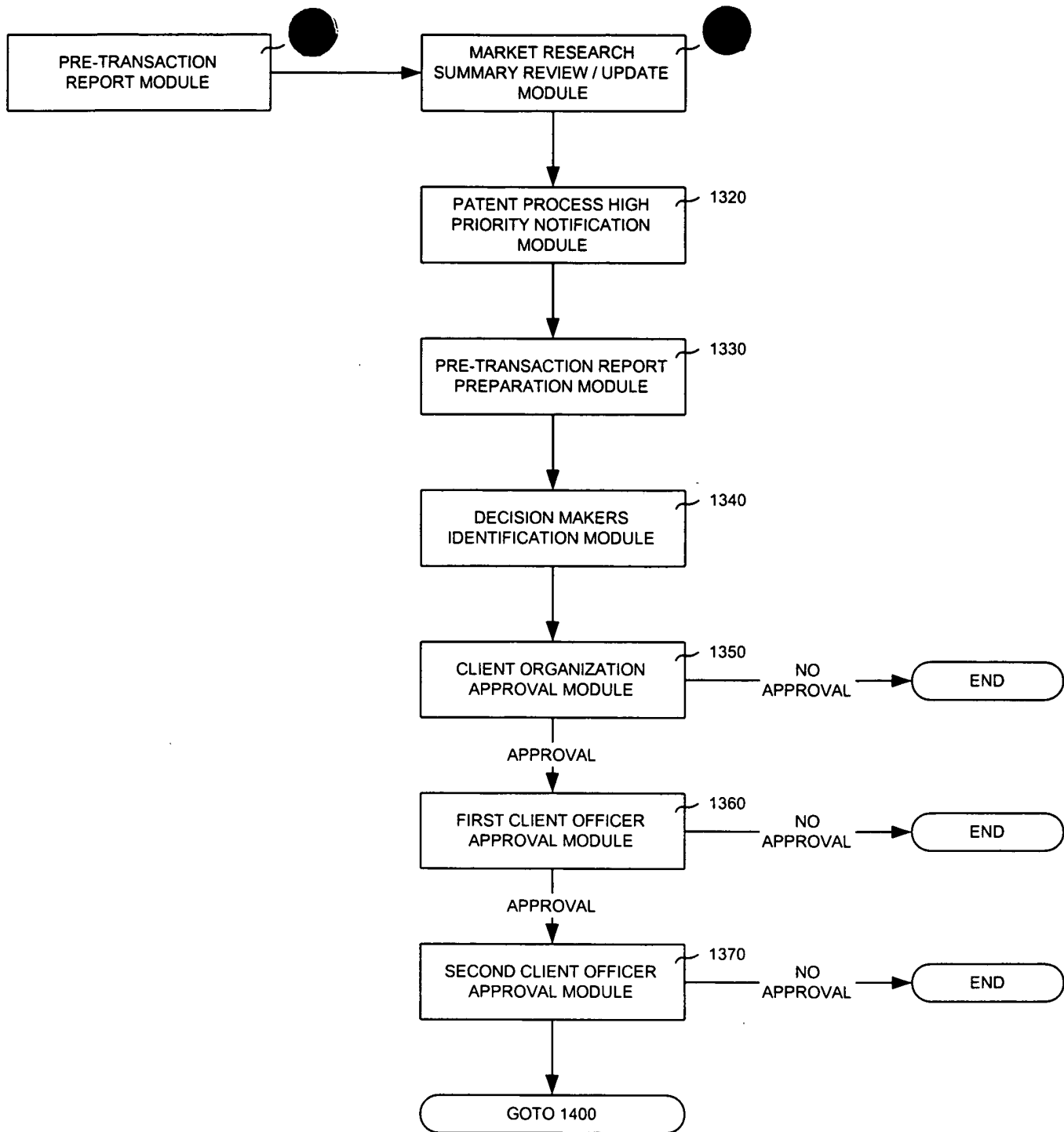


FIG. 181

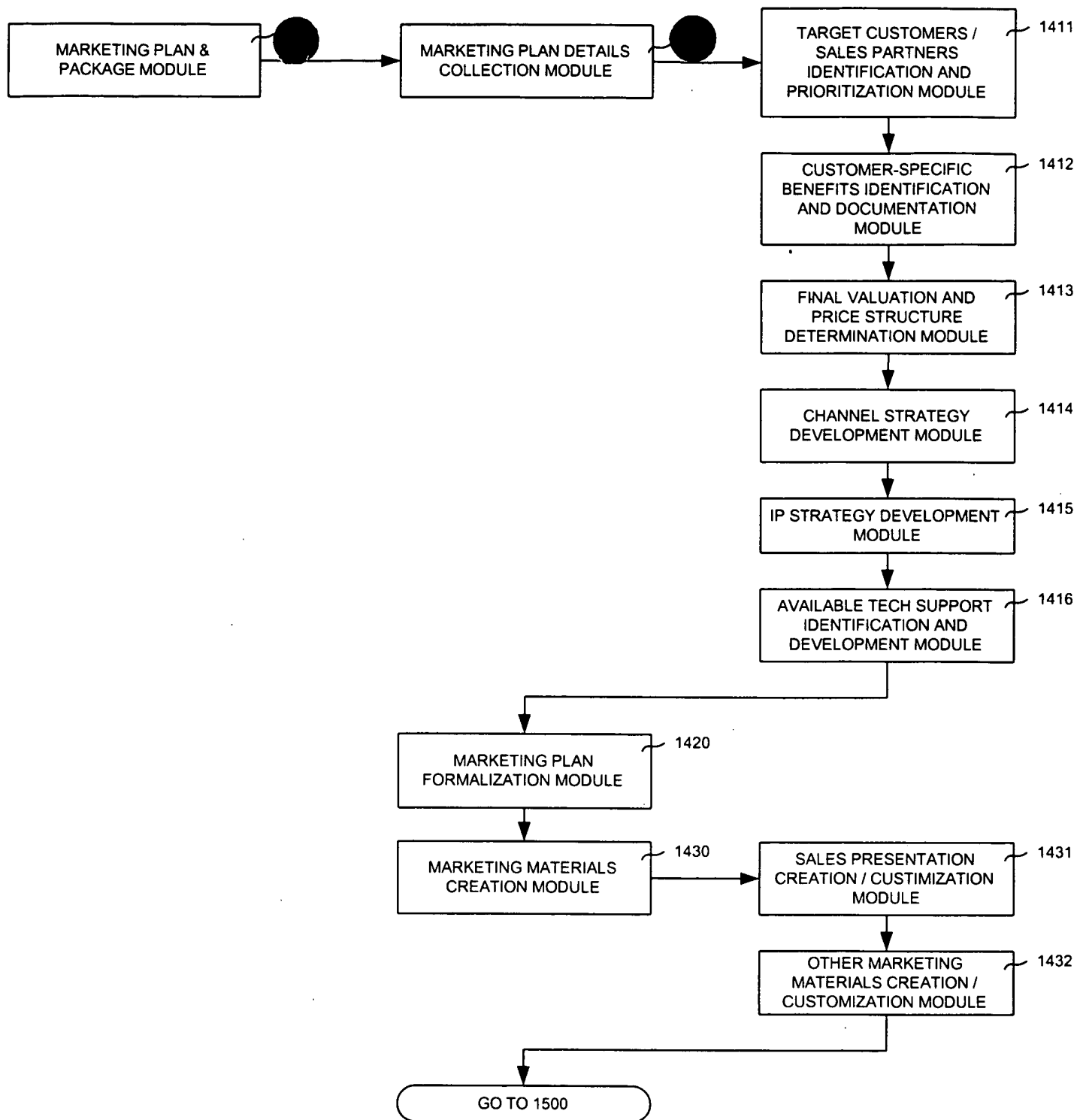
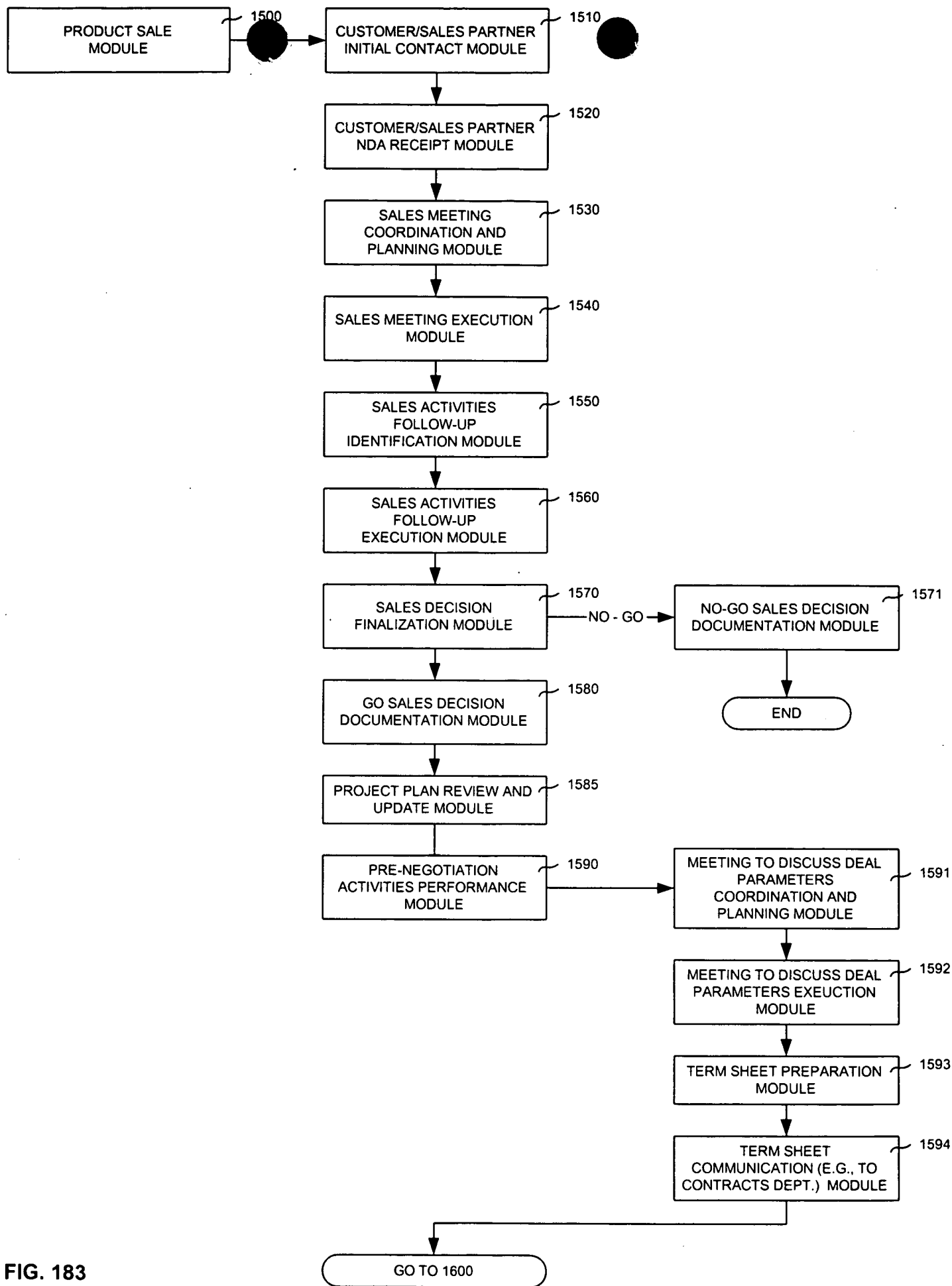
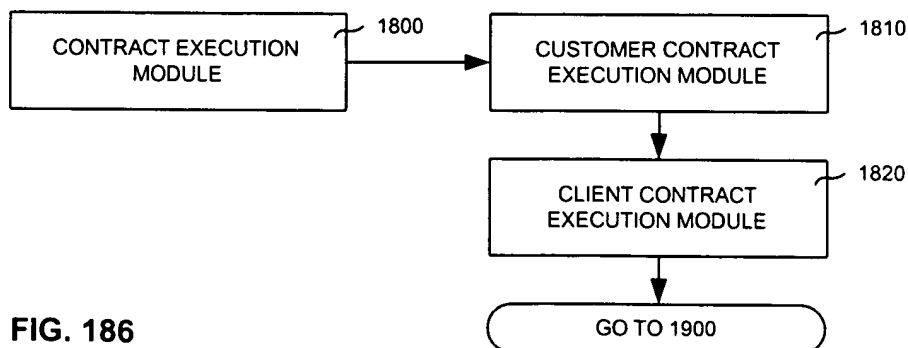
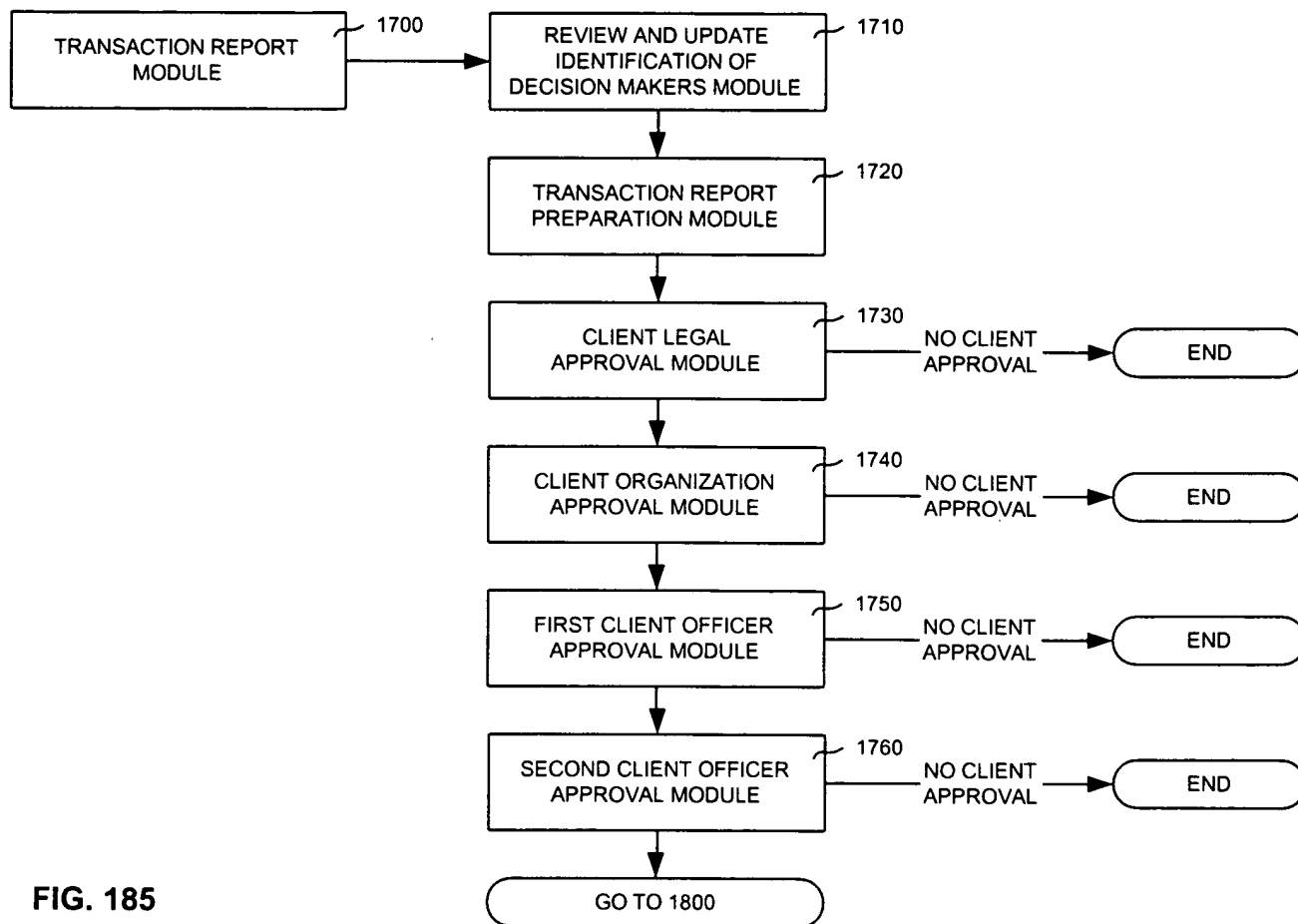
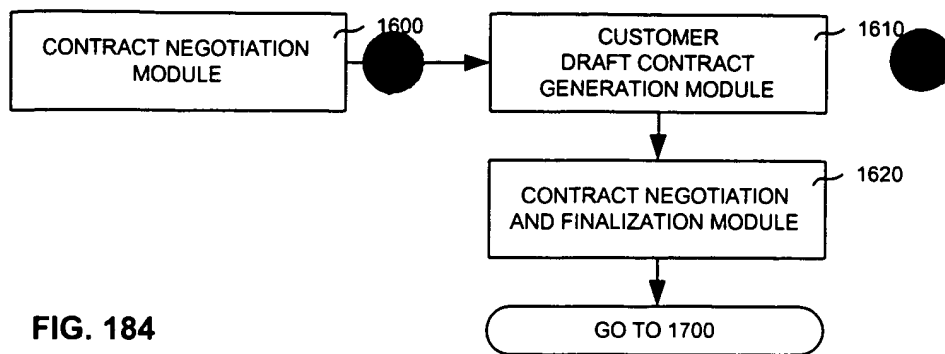
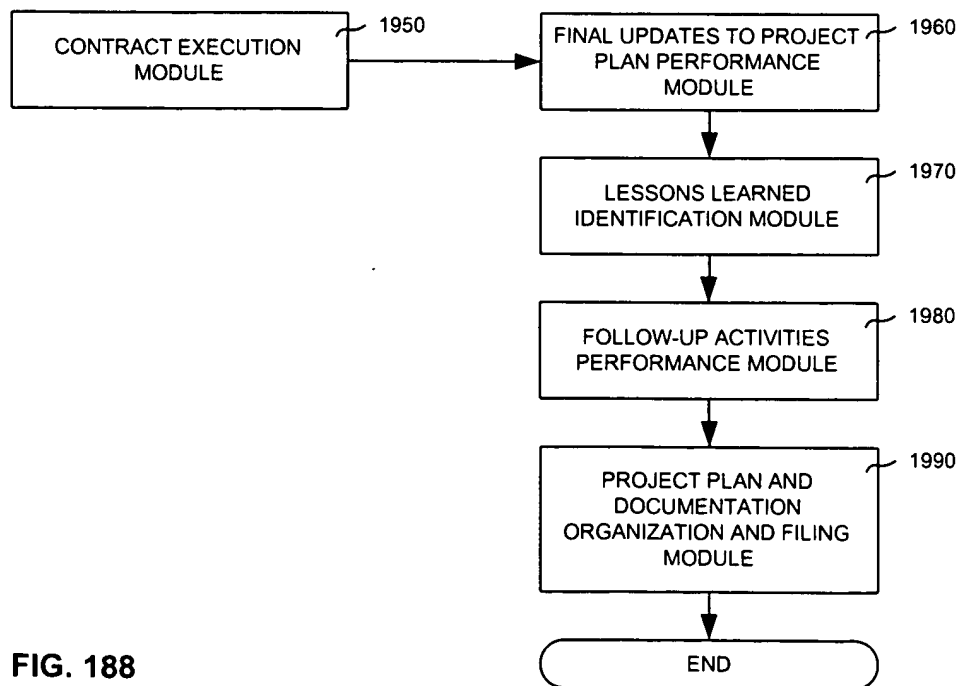
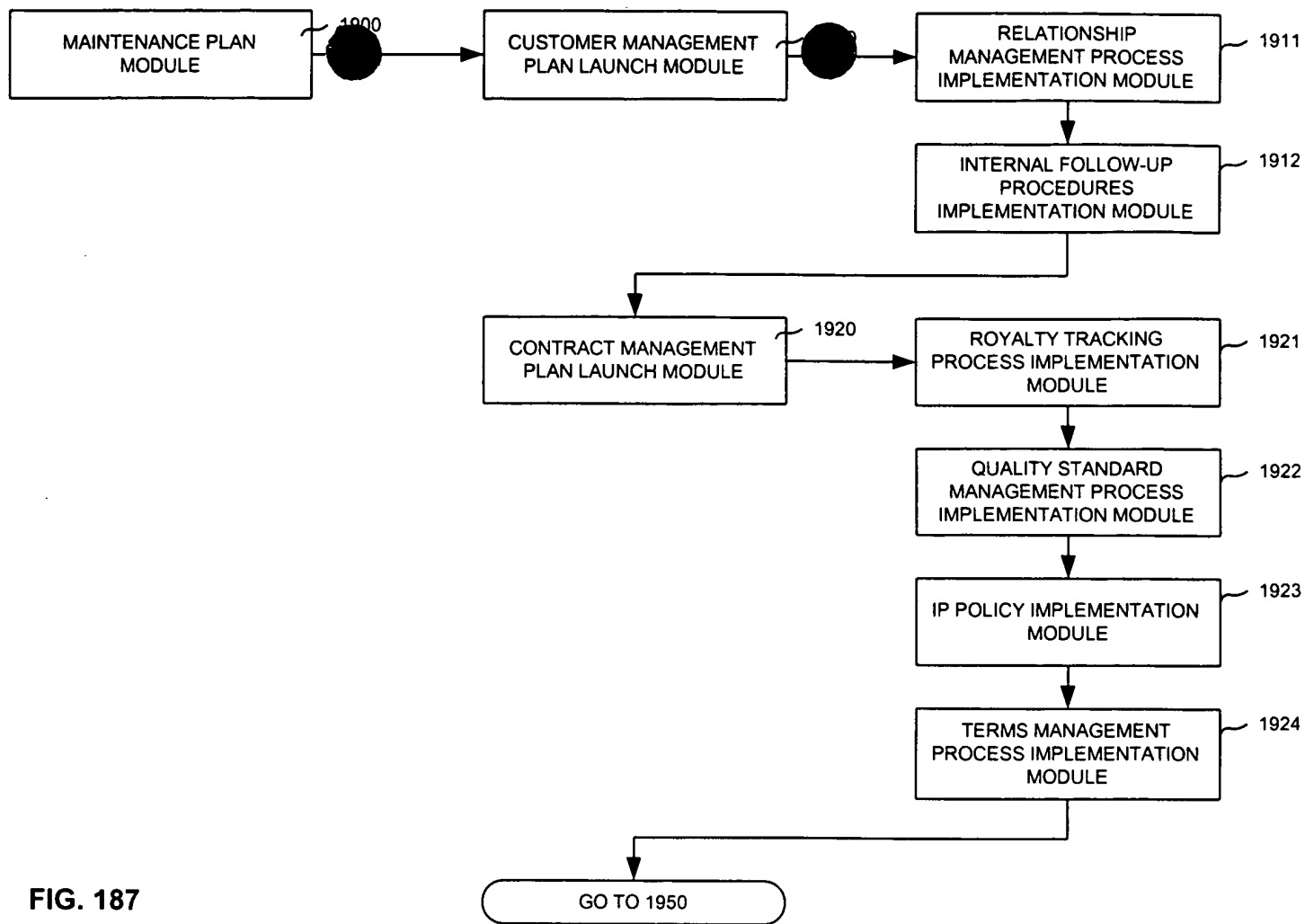


FIG. 182







Project Template Project Plan

ID	WBS	Task Name	Duration	Start	Finish	Pred	Succ	% Comp	Del	Resources
1	1	Conduct initial research	5 days	Mon 1/3/00	Fri 1/7/00			0%	No	Product Mgr
13	2	Conduct market research and analysis	10 days	Mon 1/10/00	Fri 1/21/00			0%	No	Mktg Analyst
31	3	Complete and approve pre-transaction report (PTR)	15 days	Mon 1/24/00	Fri 2/11/00			0%	No	Product Mgr
39	4	Develop marketing plan & package	15 days	Mon 1/24/00	Fri 2/11/00			0%	No	Mktg/Sales Rep
51	5	Sell product	50 days	Mon 2/14/00	Fri 4/21/00			0%	No	Mktg/Sales Rep
66	6	Negotiate contract	50 days	Mon 4/24/00	Fri 6/30/00			0%	No	Contract Mgr
69	7	Complete & approve transaction report (TR)	15 days	Mon 7/3/00	Fri 7/21/00			0%	No	Contract Mgr
76	8	Execute contract	10 days	Mon 7/24/00	Fri 8/4/00			0%	No	Contract Mgr
79	9	Set up maintenance plan	5 days	Mon 8/7/00	Fri 8/11/00		89	0%	No	Mktg/Sales Rep
88	10	Close out project	5 days	Mon 8/14/00	Fri 8/18/00			0%	Yes	Project Lead

FIG. 189

51 Sell product

At this point, duplicate project plan for each target customer for the specified product.

88 Close out project

Project may potentially end any one of several points within project plan. Must complete close out tasks at where ever project end falls within project plan.

FIG. 190

Project Template Project Plan

ID	WBS	Task Name	Duration	Start	Finish	Pred	Succ	% Comp	Deliv	Resources
1	1	Conduct Initial research	5 days	Mon 1/3/00	Fri 1/7/00			0%	No	Product Mgr
2	1.1	Schedule & prepare for client interview	1 day	Mon 1/3/00	Mon 1/3/00		3	0%	No	Product Mgr
3	1.2	Conduct & document client interview	1 day	Tue 1/4/00	Tue 1/4/00	2	10,11	0%	No	Product Mgr
4	1.2.1	Gather product information	1 day	Tue 1/4/00	Tue 1/4/00			0%	No	Product Mgr
5	1.2.2	ID tech support issues	1 day	Tue 1/4/00	Tue 1/4/00			0%	No	Product Mgr
6	1.2.3	ID potential roadblocks	1 day	Tue 1/4/00	Tue 1/4/00			0%	No	Product Mgr
7	1.2.4	ID potential customers/suppliers	1 day	Tue 1/4/00	Tue 1/4/00			0%	No	Product Mgr
8	1.2.5	Perform initial assessment of IP issues	1 day	Tue 1/4/00	Tue 1/4/00			0%	No	Product Mgr
9	1.2.6	ID client organization decision makers	1 day	Tue 1/4/00	Tue 1/4/00			0%	No	Product Mgr
10	1.3	Communicate and review interview results	2 days	Wed 1/5/00	Thu 1/6/00	3	12	0%	No	Product Mgr
11	1.4	Notify <i>/PMAN/</i> to begin patent process	1 day	Wed 1/5/00	Wed 1/5/00	3		0%	Yes	Product Mgr
12	1.5	Make & document prelim go/no-go decision	1 day	Fri 1/7/00	Fri 1/7/00	10	25,14,21	0%	Yes	Product Mgr
13	2	Conduct market research and analysis	10 days	Mon 1/10/00	Fri 1/21/00			0%	No	Mktg Analyst
14	2.1	Assess competitive environment	4 days	Mon 1/10/00	Thu 1/13/00	12	24	0%	No	Mktg Analyst
15	2.1.1	ID similar products	4 days	Mon 1/10/00	Thu 1/13/00			0%	No	Mktg Analyst
16	2.1.2	ID existing suppliers	4 days	Mon 1/10/00	Thu 1/13/00			0%	No	Mktg Analyst
17	2.1.3	ID potential suppliers	4 days	Mon 1/10/00	Thu 1/13/00			0%	No	Mktg Analyst
18	2.1.4	ID potential customer base	4 days	Mon 1/10/00	Thu 1/13/00		41	0%	No	Mktg Analyst
19	2.1.5	Update & expand product benefits	4 days	Mon 1/10/00	Thu 1/13/00			0%	No	Mktg Analyst
20	2.1.6	Determine market value/price	4 days	Mon 1/10/00	Thu 1/13/00			0%	No	Mktg Analyst
21	2.2	Assess internal marketing issues	4 days	Mon 1/10/00	Thu 1/13/00	12	24	0%	No	Product Mgr
22	2.2.1	ID & assess IP issues	4 days	Mon 1/10/00	Thu 1/13/00			0%	No	Product Mgr
23	2.2.2	ID & assess tech support issues	4 days	Mon 1/10/00	Thu 1/13/00			0%	No	Product Mgr

Project Template Project Plan

ID	WBS	Task Name	Duration	Start	Finish	Pred	Succ	% Comp	Del	Resources
24	2.3	Prepare market research summary	1 day	Fri 1/14/00	Fri 1/14/00	14,21	26	0%	Yes	Mktg Analyst
25	2.4	ID decision makers	1 day	Mon 1/10/00	Mon 1/10/00	12	26	0%	Yes	Product Mgr
26	2.5	Communicate and review research results	2 days	Mon 1/17/00	Tue 1/18/00	24,25	27	0%	No	Mktg Analyst
27	2.6	Conduct team evaluation on results	1 day	Wed 1/19/00	Wed 1/19/00	26	28	0%	No	Product Mgr
28	2.7	Make & document product go/no go decision	1 day	Thu 1/20/00	Thu 1/20/00	27	29,30	0%	Yes	Product Mgr
29	2.8	Prioritize project opportunity or notify client of no go decision	1 day	Fri 1/21/00	Fri 1/21/00	28	41,34,35,32,33,41	0%	Yes	Product Mgr
30	2.9	Review & update project plan	1 day	Fri 1/21/00	Fri 1/21/00	28		0%	Yes	Product Mgr
31	3	Complete and approve pre-transaction report (PTR)	15 days	Mon 1/24/00	Fri 2/11/00			0%	No	Product Mgr
32	3.1	Review/update market research summary	1 day	Mon 1/24/00	Mon 1/24/00	29		0%	Yes	Mktg Analyst
33	3.2	Notify <i>IPMAN</i> of potential sale/move patent process into high priority	1 day	Mon 1/24/00	Mon 1/24/00	29		0%	No	Product Mgr
34	3.3	Prepare PTR	5 days	Mon 1/24/00	Fri 1/28/00	29	36	0%	Yes	Product Mgr
35	3.4	ID decision makers	1 day	Mon 1/24/00	Mon 1/24/00	29		0%	Yes	Product Mgr
36	3.5	Gain client organization approval	4 days	Mon 1/31/00	Thu 2/3/00	34	37	0%	Yes	Product Mgr
37	3.6	Gain VP Corporate Development approval	3 days	Fri 2/4/00	Tue 2/8/00	36	38	0%	Yes	Product Mgr
38	3.7	Gain VP CIO approval	3 days	Wed 2/8/00	Fri 2/11/00	37	52	0%	Yes	Product Mgr
39	4	Develop marketing plan & package	15 days	Mon 1/24/00	Fri 2/11/00			0%	No	Mktg/Sales
40	4.1	Gather marketing plan details	5 days	Mon 1/24/00	Fri 1/28/00	29	47	0%	No	Mktg/Sales Rep
41	4.1.1	ID & prioritize target customer(s)/sales partners	5 days	Mon 1/24/00	Fri 1/28/00	18,29		0%	Yes	Mktg/Sales Rep
42	4.1.2	ID & document customer-specific benefits	5 days	Mon 1/24/00	Fri 1/28/00			0%	Yes	Mktg/Sales Rep
43	4.1.3	Determine final valuation & price structure	5 days	Mon 1/24/00	Fri 1/28/00			0%	Yes	Mktg Analyst
44	4.1.4	Develop channel strategy	5 days	Mon 1/24/00	Fri 1/28/00			0%	Yes	Mktg/Sales Rep
45	4.1.5	Develop IP strategy	5 days	Mon 1/24/00	Fri 1/28/00			0%	No	Mktg/Sales Rep
46	4.1.6	ID & develop available tech support	5 days	Mon 1/24/00	Fri 1/28/00			0%	No	Mktg/Sales Rep

Project Template Project Plan

ID	WBS	Task Name	Duration	Start	Finish	Pred	Succ	% Comp	Del	Resources
47	4.2	Formalize marketing plan	5 days	Mon 1/31/00	Fri 2/4/00	40	50,49	0%	Yes	Mktg/Sales Rep
48	4.3	Create marketing materials	5 days	Mon 2/7/00	Fri 2/11/00			0%	No	Product Mgr
49	4.3.1	Create/customize sales presentation	5 days	Mon 2/7/00	Fri 2/11/00	47		0%	Yes	Product Mgr
50	4.3.2	Create/customize other marketing materials	5 days	Mon 2/7/00	Fri 2/11/00	47		0%	Yes	Product Mgr
51	5	Sell product	50 days	Mon 2/14/00	Fri 4/21/00			0%	No	Mktg/Sales Rep
52	5.1	Make initial contact with customer(s)/sales partners	3 days	Mon 2/14/00	Wed 2/16/00	38	53	0%	Yes	Mktg/Sales Rep
53	5.2	Obtain NDA from customer/sales partner	5 days	Thu 2/17/00	Wed 2/23/00	52	54	0%	Yes	Mktg/Sales Rep
54	5.3	Coordinate & plan sales meeting	10 days	Thu 2/24/00	Wed 3/8/00	53	55	0%	Yes	Mktg/Sales Rep
55	5.4	Conduct sales meeting	1 day	Thu 3/9/00	Thu 3/9/00	54	56	0%	No	Mktg/Sales Rep
56	5.5	ID follow-up sales activities	1 day	Fri 3/10/00	Fri 3/10/00	55	57	0%	Yes	Mktg/Sales Rep
57	5.6	Perform follow-up sales activities	5 days	Mon 3/13/00	Fri 3/17/00	56	58	0%	No	Mktg/Sales Rep
58	5.7	Finalize sales decision	10 days	Mon 3/20/00	Fri 3/31/00	57	59,60,62	0%	Yes	Mktg/Sales Rep
59	5.8	Document go/no go sale decision	1 day	Mon 4/3/00	Mon 4/3/00	58		0%	Yes	Mktg/Sales Rep
60	5.9	Review & update project plan	1 day	Mon 4/3/00	Mon 4/3/00	58		0%	Yes	Mktg/Sales Rep
61	5.10	Perform pre-negotiation activities	15 days	Mon 4/3/00	Fri 4/21/00			0%	No	Mktg/Sales Rep
62	5.10.1	Coordinate & plan meeting to discuss deal parameters	10 days	Mon 4/3/00	Fri 4/14/00	58	63	0%	Yes	Mktg/Sales Rep
63	5.10.2	Conduct meeting to discuss deal parameters	1 day	Mon 4/17/00	Mon 4/17/00	62	64	0%	No	Mktg/Sales Rep
64	5.10.3	Prepare term sheet	3 days	Tue 4/18/00	Thu 4/20/00	63	65	0%	Yes	Mktg/Sales Rep
65	5.10.4	Communicate term sheet to Contracts	1 day	Fri 4/21/00	Fri 4/21/00	64	67	0%	No	Mktg/Sales Rep
66	6	Negotiate contract	50 days	Mon 4/24/00	Fri 6/30/00			0%	No	Contract Mgr
67	6.1	Generate draft contract for customer	5 days	Mon 4/24/00	Fri 4/28/00	65	68	0%	Yes	Contract Mgr
68	6.2	Negotiate and finalize contract	45 days	Mon 5/1/00	Fri 6/30/00	67	70,71	0%	Yes	Contract Mgr
69	7	Complete & approve transaction report (TR)	15 days	Mon 7/3/00	Fri 7/21/00			0%	No	Contract Mgr

Project Template Project Plan

ID		WBS	Task Name	Duration	Start	Finish	Pred	Succ	% Comp	Del	Resources
70		7.1	Review/update decision makers	1 day	Mon 7/3/00	Mon 7/3/00	68		0%	Yes	Mktg/Sales Rep
71		7.2	Prepare TR	5 days	Mon 7/3/00	Fri 7/7/00	68	72	0%	Yes	Mktg/Sales Rep
72		7.3	Obtain IP/MARK legal approval	1 day	Mon 7/10/00	Mon 7/10/00	71	73	0%	Yes	Contract Mgr
73		7.4	Obtain client organization approval	3 days	Tue 7/11/00	Thu 7/13/00	72	74	0%	Yes	Contract Mgr
74		7.5	Obtain VP Corporate Development approval	3 days	Fri 7/14/00	Tue 7/18/00	73	75	0%	Yes	Contract Mgr
75		7.6	Obtain VP CIO approval	3 days	Wed 7/19/00	Fri 7/21/00	74	77	0%	Yes	Contract Mgr
76		8	Execute contract	10 days	Mon 7/24/00	Fri 8/4/00			0%	No	Contract Mgr
77		8.1	Obtain customer contract signature	8 days	Mon 7/24/00	Wed 8/2/00	75	78	0%	Yes	Contract Mgr
78		8.2	Obtain IP/MARK contract signature	2 days	Thu 8/3/00	Fri 8/4/00	77	80,83	0%	Yes	Contract Mgr
79		9	Set up maintenance plan	5 days	Mon 8/7/00	Fri 8/11/00		89	0%	No	Mktg/Sales Rep
80		9.1	Launch customer management plan	5 days	Mon 8/7/00	Fri 8/11/00	78		0%	No	Mktg/Sales Rep
81		9.1.1	Implement relationship management process	5 days	Mon 8/7/00	Fri 8/11/00			0%	No	Mktg/Sales Rep
82		9.1.2	Implement internal follow-up procedures	5 days	Mon 8/7/00	Fri 8/11/00			0%	No	Mktg/Sales Rep
83		9.2	Launch contract management plan	5 days	Mon 8/7/00	Fri 8/11/00	78		0%	No	Contract Mgr
84		9.2.1	Implement royalty tracking process	5 days	Mon 8/7/00	Fri 8/11/00			0%	No	Contract Mgr
85		9.2.2	Implement quality standard management process	5 days	Mon 8/7/00	Fri 8/11/00			0%	No	Contract Mgr
86		9.2.3	Implement IP policing	5 days	Mon 8/7/00	Fri 8/11/00			0%	No	Contract Mgr
87		9.2.4	Implement terms management process	5 days	Mon 8/7/00	Fri 8/11/00			0%	No	Contract Mgr
88		10	Close out project	5 days	Mon 8/14/00	Fri 8/18/00			0%	Yes	Project Lead
89		10.1	Perform final updates to project plan	1 day	Mon 8/14/00	Mon 8/14/00	79	90	0%	Yes	Project Lead
90		10.2	Identify lessons learned & perform follow-up activities	2 days	Tue 8/15/00	Wed 8/16/00	89	91	0%	Yes	Project Lead
91		10.3	Organize & file project plan & documentation	2 days	Thu 8/17/00	Fri 8/18/00	90		0%	Yes	Project Lead

- 3 Conduct & document client interview
If create interview form, can eliminate tasks 1.2.1 thru 1.2.6
- 4 Gather product information
Must include product benefits, similar products, etc.
- 5 ID tech support issues
Type of support required? Tech transfer? Support partner? No support?
- 8 Perform initial assessment of IP issues
Title and rights:
1. Ownership?
2. Protection?
3. Possible infringement?
- 9 ID client organization decision makers
Consider decision makers and needed officer buy-in.
- 11 Notify *IPMAN* to begin patent process
Potential checklist/form for interview process. If form, change task to "Provide interview form (name or number) to IPMAN". This notification will trigger IPMAN to review patent status.
- 12 Make & document prelim go/no-go decision
Potential form to doc reasons for go/no go.
- 14 Assess competitive environment
Potential checklist or standard form for assessing comp. environment. If so, may choose to delete 2.1.1 thru 2.1.7 and change 2.1 task name to something like complete Form XXX, Competitive Environment Assessment.
- 22 ID & assess IP issues
Expanded investigation of any ownership, protection, potential infringement issues.
- 24 Prepare market research summary
Potential Score Card form. If so, indicate in task field.
- 25 ID decision makers
Verify that all key decision makers are identified
- 28 Make & document product go/no go decision
Potential form to doc reasons for go/no go.
- 29 Prioritize project opportunity or notify client of no go decision
Create scorecard to prioritize.
Create form letter that thanks client and notifies of status of product.
- 32 Review/update market research summary
Potential form, Part 2 of Score Card, more market plan specific info.
- 34 Prepare PTR
No formal client interview but Product Manager will communicate with client regularly while preparing the PTR
- 35 ID decision makers
May require multiple client approvals. If so, add task for additional approval(s) - i.e. business unit and IT approval.
- 42 ID & document customer-specific benefits
If form or checklist, can eliminate this task. May be considered part of marketing plan.
- 43 Determine final valuation & price structure
If form or checklist, can eliminate this task.

Project Template Project Plan

- 51 Sell product
At this point, duplicate project plan for each target customer for the specified product.
- 52 Make initial contact with customer(s)/sales partners
Must have signed PTR before initial contact with potential customer
- 53 Obtain NDA from customer/sales partner
Inbound NDA for receiving information and mutual NDA also available on h: drive
- 55 Conduct sales meeting
Including PowerPoint sales presentation
- 56 ID follow-up sales activities
May include demos, site visits to existing customers, brochures, additional presentations, response to meeting questions...OR NOTHING!
- 58 Finalize sales decision
Resource for this task is actually the customer.
- 63 Conduct meeting to discuss deal parameters
Recommend use term sheet for outline of meeting agenda. See link to term sheet on task 5.10.3, Prepare term sheet.
- 68 Negotiate and finalize contract
Could be multiple drafts and result in additional meetings between IPMARK and customer, includes obtaining all necessary approvals
- 71 Prepare TR
If time & resources permit, Mktg/Sales rep should begin pulling together the TR in parallel with task 6.2, Negotiate & finalize contract.
- 85 Implement quality standard management process
Follow up with new customer/sales partner for samples of products to check for product quality.
- 88 Close out project
Project may potentially end any one of several points within project plan. Must complete close out tasks at where ever project end falls within project plan.
- 89 Perform final updates to project plan
Final updates include any clean-up to project plan, e.g. review/update task durations to accurately represent time spent on project tasks. Final update helpful in accurately tracking project and project plan efficiency to allow for process improvement.
- 90 Identify lessons learned & perform follow-up activities
Follow-up could include analyzing project effectiveness and updating generic plan
- 91 Organize & file project plan & documentation
Final project plan should be part of project documentation. Need to develop checklist for keep/not keep documentation. May want to choose std color file for this so always identifiable. Also consider one color for project in progress and another color for project complete.

1. Gather product information
2. ID tech support issues
3. ID potential roadblocks
4. ID potential customers/suppliers
5. Perform initial assessment of IP issues
6. ID client organization decision makers

Assess competitive environment checklist (task 2.1)

(Duration: 4 days – Complete by: _____)

ID similar products _____

ID existing suppliers _____

ID potential suppliers _____

ID potential customer base _____

Update & expand product benefits _____

Determine market value/price..... _____

FIG. 198

Assess internal marketing issues checklist (task 2.2)
(Addresses internal IP and Tech Support issues)

1. ID & assess IP issues

2. ID & assess tech support issues

FIG. 199

**INTELLECTUAL PROPERTY OUTMARKETING
PRE-TRANSACTION REQUEST**

Product/Project Name: _____

Entity Requesting: _____

**Contacts (Entity
Name, Phone Numbers,
Email):** _____

**Outmarketing Party(s)
(Company, Address, State of
Incorporation, Contacts, Phone
Phone Numbers):** _____

**Intellectual Property Involved:
(Patents, Trademarks, Trade
Secrets, Software, etc.)** _____

**Background of Deal
(How Deal Developed,
Summary of
Intellectual Property
Functionality/Uses,
Deal Structure):** _____

**Financial Analysis
(Revenue to be Recognized,
Cost Savings, etc.):** _____

**Competitive Analysis
(Worldwide, Outside US,
US only, Outside 9 State
Region, etc.):** _____

**Status of Deal
(Ready to Sign Up, Need
Negotiation Assistance):** _____

**Anticipated Timeline
(Initial Meeting, Demos,
Sign Contract, etc.):** _____

_____, a _____ Corporation subsidiary, requests IPMARK
_____ on its behalf to enter into an intellectual property outmarketing agreement according to the above-
described terms.

Requestor

Entity/Dept.

Title

Date

Marketing Plan checklist (task 4.1)

ID & prioritize target customer(s)/sales partners
ID & document customer-specific benefits
Determine final valuation & price structure
Develop channel strategy
Develop IP strategy
ID & develop available tech support
Formalize marketing plan

FIG. 201

NONDISCLOSURE AGREEMENT

THIS NONDISCLOSURE AGREEMENT is made by and between [Name of _____ Entity], a corporation organized under the laws of _____ ("OWNER"), and _____, a corporation organized under the laws of _____ (the "Company"), effective as of _____, 20____. The parties agree as follows:

1. Project Defined. The Company may receive from OWNER information of a non-public nature for use by the Company and its officers, directors, agents, employees and representatives, including financial and legal advisers (collectively "Representatives"), in the course of the performance of the Company's services for OWNER in connection with _____

_____ (the "Project").

2. Information Defined. The Company acknowledges that, in the course of its performance of services for or discussions with OWNER in connection with the Project, the Company will receive certain private and proprietary information from or about OWNER or its affiliates, including but not limited to technical, financial or business information and models, names of customers or partners, proposed business deals, reports, plans, market projections, software programs, data or any other private and proprietary information relating to the Project which may include certain trade secrets ("Information"). The term "Information" as used herein also includes: (i) the fact that the Information has been made available to or is being inspected or evaluated by the Company; (ii) the fact that the Company is providing services to OWNER or is otherwise involved in or discussing the Project; and (iii) any information, work papers, analyses, compilations, projections, studies, documents, terms, conditions, correspondence, facts or other materials derived or produced by the Company or its representatives for OWNER in connection with the Project. Any Information supplied by OWNER to the Company prior to the execution of this Agreement shall be subject to the same treatment as the Information made available after the execution of this Agreement.

3. Exclusions from Definition. The term "Information" as used herein does not include any data or information that: (a) is already known to the Company at the time it is disclosed to the Company; or (b) before being divulged by the Company: (i) has become generally known to the public through no wrongful act of the Company or its representatives; (ii) has been rightfully received by the Company from a third party without restriction on disclosure and without a breach of an obligation of confidentiality

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running directly or indirectly to **OWNER**; (iii) has been approved for release by a written authorization by **OWNER**; or (iv) is independently developed by the Company without use, directly or indirectly, of the Information received from **OWNER**.

4. Nondisclosure Obligation. The Company shall keep the Information confidential and shall not disclose such Information, in whole or in part, to any person other than its Representatives who need to know such Information in connection with the Company's performance of services for **OWNER** in connection with the Project except with the prior written consent of **OWNER** or as otherwise permitted hereunder. Such Representatives shall be informed by the Company of the confidential nature of the Information and shall be required by the Company to agree in writing to be bound by this Agreement. The Information shall be used by the Company solely for the purpose of performing services for or otherwise evaluating the information provided by **OWNER** in connection with the Project, and shall not be otherwise used for the Company's own benefit or for any purpose detrimental to the interests of

5. Standard of Protection. For the purpose of complying with the obligations set forth herein, the Company shall use efforts commensurate with those that it employs for the protection of corresponding sensitive information of its own, which shall in any event be no lesser a standard than the type of efforts that would be taken by a reasonable business for the protection of its own highly confidential information and trade secrets.

6. Compliance with Legal Process. In the event that the Company is legally requested or required (by oral questions, interrogatories, requests for information or documents, subpoena, Civil Investigative Demand or similar process or, in the opinion of counsel for the Company, by federal or state securities or other statutes, regulations or laws) to disclose any Information, the Company shall promptly notify **OWNER** of such request or requirement prior to disclosure so that **OWNER** may seek an appropriate protective order and/or waive compliance with the terms of this Agreement.

7. Ownership; Return of Information. All Information (including tangible copies and computerized or electronic versions and summaries thereof) shall remain the property of **OWNER**. Within ten (10) days following the receipt of a written request from **OWNER**, the Company shall deliver to **OWNER** all tangible materials containing or embodying the Information received from **OWNER**, together with a certificate executed by an officer of the Company certifying that all such materials in the Company's possession or control have been delivered to **OWNER** or destroyed. The Company shall not assert directly or indirectly any right with respect to the Information which may impair or be adverse to **OWNER's** ownership thereof.

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8. Remedies for Breach. The Company understands and agrees that money damages would not be a sufficient remedy for any breach of this Agreement and that **OWNER** shall be entitled to seek injunctive or other equitable relief to remedy or forestall any such breach or threatened breach. Such remedy shall not be deemed to be the exclusive remedy for any breach of this Agreement, but shall be in addition to all other rights and remedies available at law or in equity.

9. No Representations or Further Obligations. Neither this Agreement nor the disclosure of Information shall constitute or imply any promise or intention to make any purchase of services by **OWNER**. None of the Information which may be disclosed by **OWNER** shall constitute any representation, warranty, assurance, guarantee or inducement by **OWNER** to the Company of any kind, and in particular, with respect to the accuracy or completeness of any Information or the non-infringement of trademarks, patents, copyrights, mask protection rights or any other intellectual property rights, or other rights of third persons. It is understood that this Agreement does not obligate **OWNER** to enter into any further agreements or to proceed with any possible relationship or other transaction.

10. Term; Termination. This Agreement shall terminate as to the exchange of any new Information three (3) years after the effective date hereof. Either party may terminate the exchange of Information under this Agreement at any time by written notice to the other specifically referencing this Agreement. In any event, however, the obligations of the Company to maintain the confidentiality of the Information it has received under this Agreement shall continue for a period of three (3) years after such termination and then terminate; provided, however, that such obligation shall continue indefinitely as to Information constituting a trade secret under applicable law for so long as such Information remains a trade secret.

11. No Waiver. No failure or delay by **OWNER** in exercising any right, power or privilege hereunder shall operate as a waiver thereof, nor shall any single or partial exercise thereof preclude any other or further exercise thereof or the exercise of any other right, power or privilege hereunder.

12. Amendment. This Agreement may not be modified, supplemented or amended orally, but only by a writing signed by both parties hereto.

13. Applicability to Associated Parties. Any information disclosed to the Company by any of **OWNER**'s affiliated companies or by any company, person or other entity participating with **OWNER** in any consortium, partnership, joint venture or

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similar business combination in connection with the Project, which would otherwise constitute Information hereunder if disclosed by **OWNER**, shall be deemed to constitute Information under this Agreement, and the rights of **OWNER** under this Agreement may be enforced by any such affiliate or other entity in addition to with respect to any violation relating to the Information disclosed by such affiliate or other entity, as if such entity were also a party to this Agreement.

14. Governing Law. This Agreement shall be governed by and construed and enforced in accordance with the laws of the State of _____, without regard to its choice of law provisions.

IN WITNESS WHEREOF, the parties have executed and delivered this Nondisclosure Agreement effective as of the date first written above.

OWNER:

Company:

By: _____

By: _____

Name: _____

Name: _____

Title: _____

Title: _____

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Product Name

License Agreement Term Sheet

- Definitions
What is licensed?
- Specs of the Software (exhibit)
Definition/description?
- Delivery, testing and acceptance
How should this work?
- Grant and Scope of License
Exclusive? Non-exclusive? Etc.?
- Term and Limitations on Use and reproduction
What can partnership do with it?
- Sublicensing and transfer limitations
- Pricing Terms
Royalties? Buy? Savings?
- Acct and audit rights
As stated in the partnership agmt?
- Sales and Property tax liability
Who liable?
- Trade secret protection/Confidentiality terms
Need to be strict. In what manner may disclosure be made to vendors, particularly STB mfts?

- Title to original software and owner infringement reps
Positive stmt of ownership –will we indemnify the partnership?
- Ownership of mods enhancement and additions
Who owns?
- Source code inclusion/exclusion and protection
Must source be disclosed to partnership?
- Training and documentation req's
Any?
- Protection of Trademarks
Partnership must honor ^{OWNER'S} marks
- SW maintenance and technical support obligations
- Vendor warranty obligations and scope
- Limitation of liability and types of damages
- Vendor indemnity and obligations in event of infringement
- Dispute resolution provisions
- Insurance terms (vendor on site?)
- Assignment limitations
- Std boilerplate (merger, written agmt, force majeure, etc)

INTELLECTUAL PROPERTY OUTMARKETING TRANSACTION REPORT

INTELLECTUAL PROPERTY INVOLVED:

OUTMARKETING PARTY:

BUSINESS DEAL CONTACTS:

INTELLECTUAL PROPERTY CONTACTS:

ESTIMATED VALUE:

Up Front Savings
Revenues (Years) = _____

I. Executive Summary

II. Background

FIG. 208

III. Deal Structure

IV. Financial Analysis

V. Competitive Analysis

(1) Customers:

(2) Territory:

(3) Standardization:

FIG. 209

VI. Recommendation

BUSINESS APPROVAL

LEGAL APPROVAL

Signature:

Printed Name:

Title:

Entity:

Date:

MS Project Activity Sheet

Project Name: _____

Project Start Date: _____

Project Resources:

Product Mgr _____	Contract Mgr _____
Mktg Analyst _____	Mktg/Sales Rep _____

Instructions:

1. All updates in MS Project are made at the sub-task level only.
2. In the Task # field, enter the # of the task being updated or "new" if adding a task.
3. Find the column for the field you wish to update for the task and enter update information in the space provided.
4. Use the following guidelines for updating fields in MS Project:
 - Start/Finish Date - Change the duration of the appropriate task(s) to arrive at the new start/finish date
 - % Complete - Enter the new % complete for the task(s), either manually or using the up/down arrows
 - Deliverable - Change deliverable field to Yes, either manually or using the option in the drop down box

[illegible]

FIG. 211

Opportunity Score Card

Scoring Date: _____	Scorer Initials: _____	Total Score:
Product/Project Name _____		
Business Unit _____		
Business Unit Primary Contact:	IPMARK Primary Contact:	
Name _____	Name _____	
Phone _____	Phone _____	

Score Card Key Factors	Scoring & Explanation
1. MARKET POTENTIAL <ul style="list-style-type: none"> - Product viability (i.e. unique product, benefits, support/maintenance?) - Potential customers? - Few competitive products/suppliers? - Large market, low market saturation? <div style="display: flex; justify-content: space-between; margin-top: 10px;"> High Low </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> Potential ----- Potential </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> 10 9 8 7 6 5 4 3 2 1 </div>	<div style="border: 1px solid black; padding: 5px; margin: 10px auto; width: 80%;">Market Potential Rating:</div>
2. PROJECT TIMEFRAME <ul style="list-style-type: none"> - Product developed & ready to market? - Ownership? Patent status? - Identified interested parties? - Deal simple or complex? - Anticipated time to sell/close/recognize \$? <div style="display: flex; justify-content: space-between; margin-top: 10px;"> Today ----- 12 ----- 18+ mths </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> 10 9 8 7 6 5 4 3 2 1 </div>	<div style="border: 1px solid black; padding: 5px; margin: 10px auto; width: 80%;">Project Timeframe Rating:</div>
3. PROJECTED REVENUE POTENTIAL <ul style="list-style-type: none"> - Anticipated total revenue from project? (if no strong customers, use 1X value) <div style="display: flex; justify-content: space-between; margin-top: 10px;"> Over Under </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> 5M -- 4M ----- 1M ----- 100K </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> 10 9 8 7 6 5 4 3 2 1 </div>	<div style="border: 1px solid black; padding: 5px; margin: 10px auto; width: 80%;">Revenue Potential Rating:</div>
4. COMPETITIVE THREAT TO BELL SOUTH <ul style="list-style-type: none"> - Sale give customer competitive advantage over BellSouth? <div style="display: flex; justify-content: space-between; margin-top: 10px;"> No High </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> Threat ----- Threat </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> 10 9 8 7 6 5 4 3 2 1 </div>	<div style="border: 1px solid black; padding: 5px; margin: 10px auto; width: 80%;">Competitive Threat Rating:</div>
5. INTANGIBLE VALUE <ul style="list-style-type: none"> - Set stage for future big \$ deals? - Build/foster relationship w/ existing/future customer? - Officer request/interest? - Public relations opportunity? <div style="display: flex; justify-content: space-between; margin-top: 10px;"> High Low </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> Profile ----- Profile </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> 10 9 8 7 6 5 4 3 2 1 </div>	<div style="border: 1px solid black; padding: 5px; margin: 10px auto; width: 80%;">Intangible Value Rating:</div>
	TOTAL SCORE:

FIG. 212

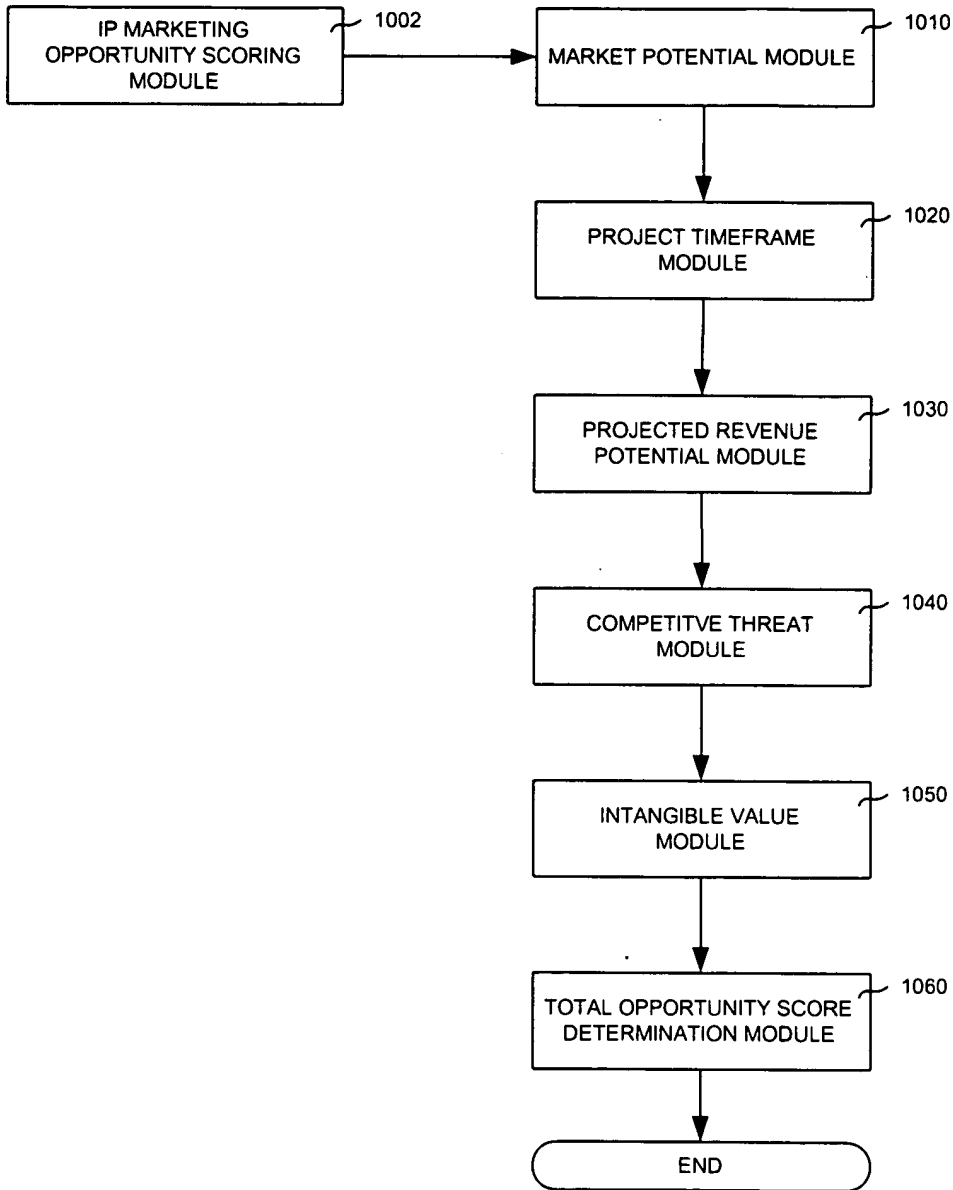


FIG. 213

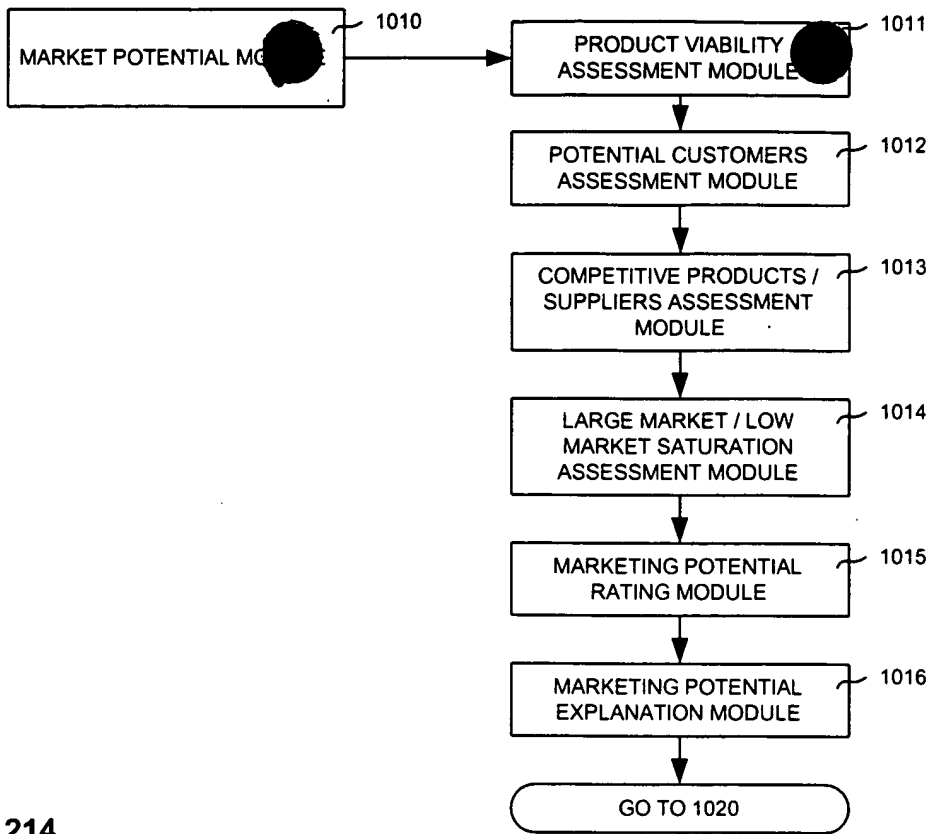


FIG. 214

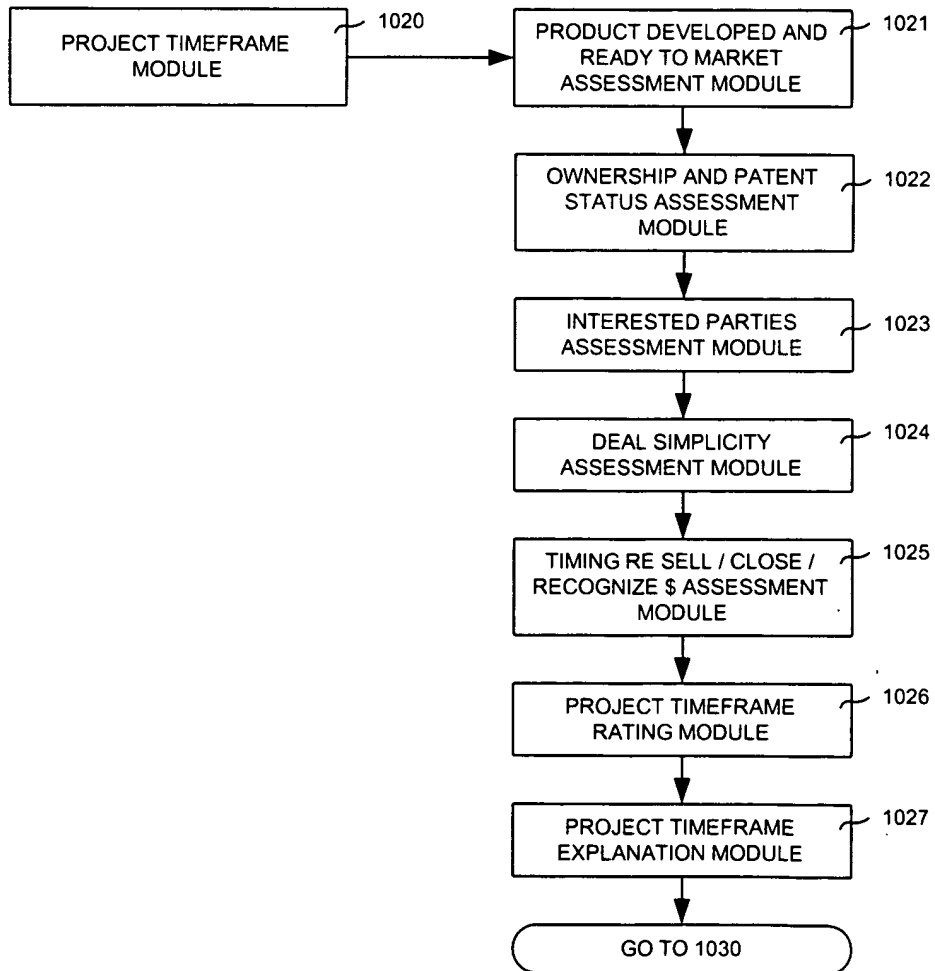


FIG. 215

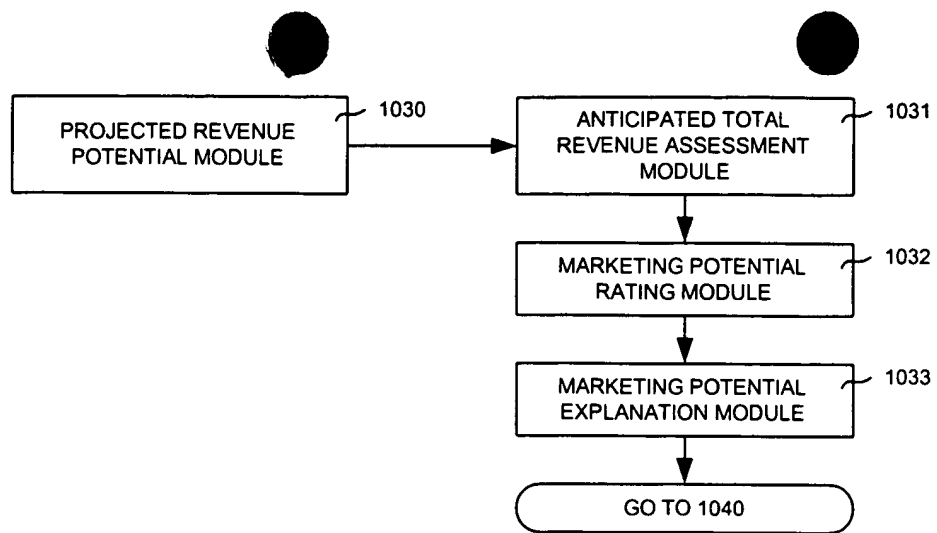


FIG. 216

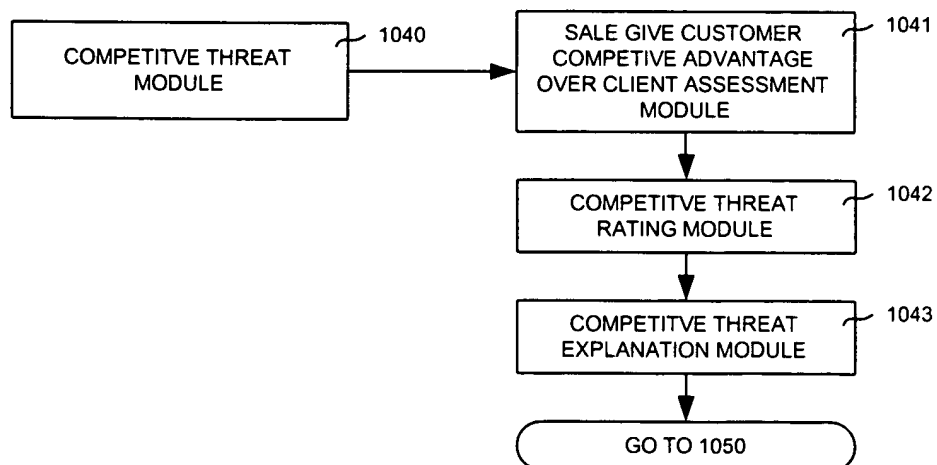


FIG. 217

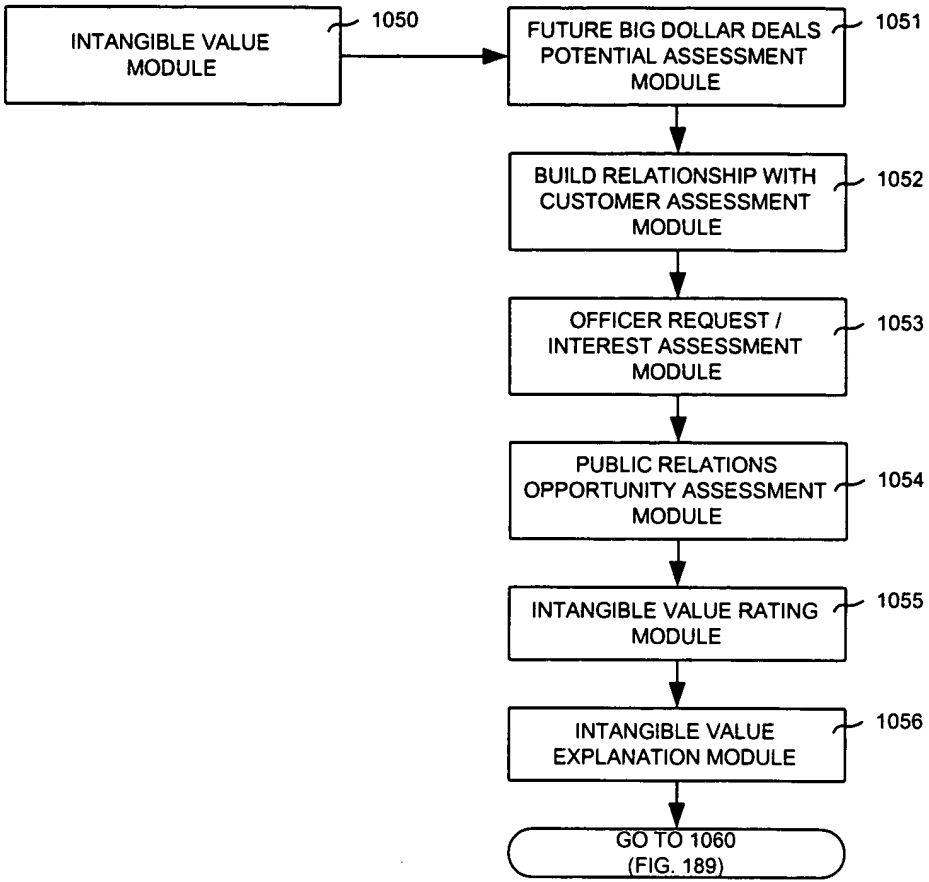


FIG. 218

INTELLECTUAL PROPERTY AWARDS PROGRAM

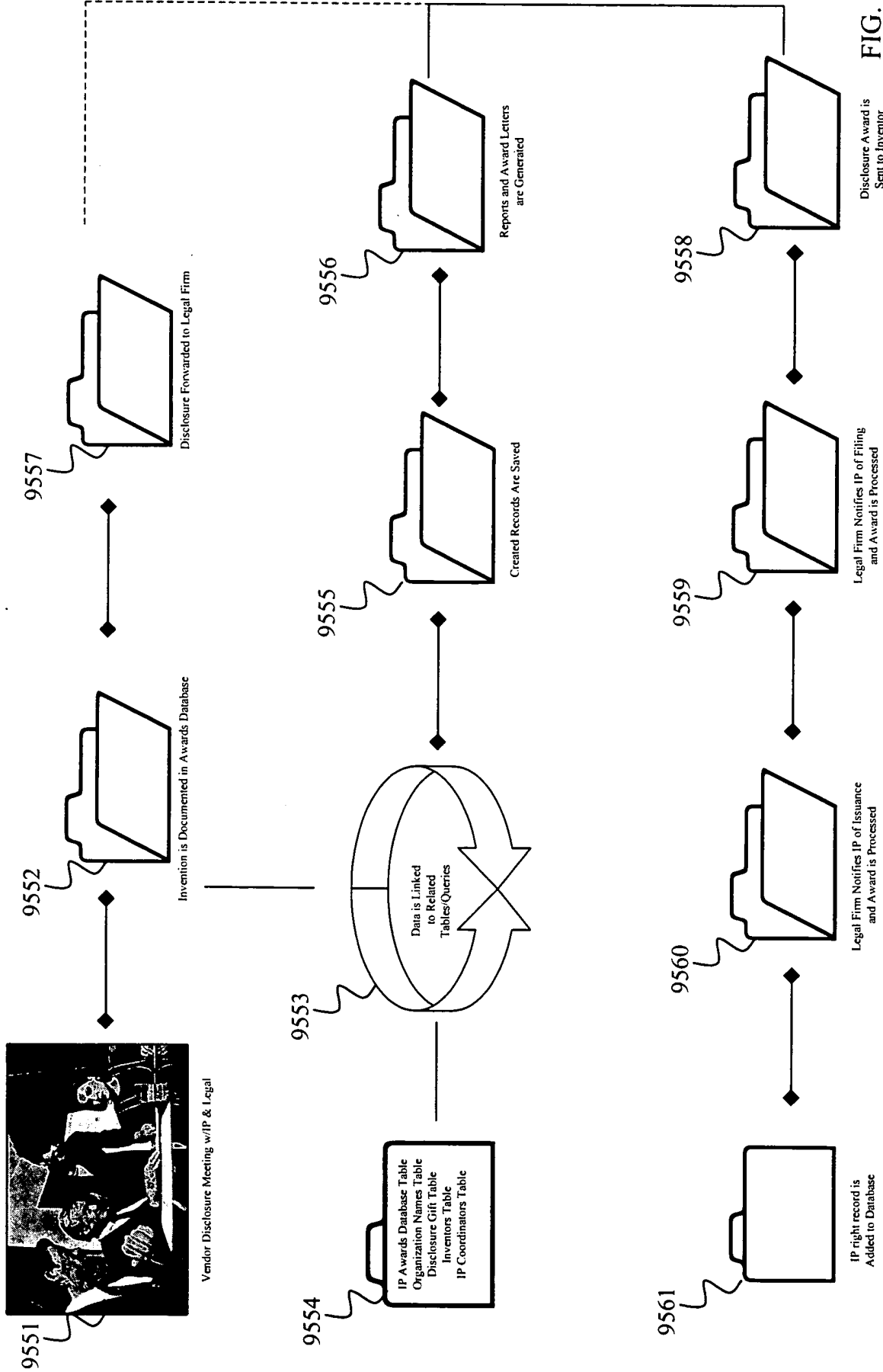


FIG. 219

>>> Company Intellectual Property >>>

>> 10 Step Checklist

✓ Patents

- ☐ Work produced by Company employees or with Company resources has been assessed for patentability if, at least one of the following occurred:
 - ⇒ Development of a new product, feature, process or software that seems unique
 - ⇒ Improvements to existing technology, product, process, or software
 - ⇒ Results that cut costs and/or improve efficiency
 - ⇒ Creation of a new business method

It is critical that employees bring their inventions to the attention of the Director of Technology (404) xxx-xxxx or the Technology Asset Manager (404) xxx-xxxx as soon as possible, and especially before any public disclosure of the invention!

✓ Trademarks

- ☐ The Company mark and subbrands have been used in accordance with the company's graphics standards to ensure that the significant value of the mark is not diluted.
- ☐ All subbrands have been cleared by the Director of Trademarks.
- ☐ All third party (such as agents, distributors, co-brand parties, and sponsored parties) use of Company's trademarks have been authorized in writing using language approved by Company Intellectual Property Marketing Corp.

Any questions regarding Graphics and Sponsorships should be brought to the attention of the Director of Corporate Identity (404) xxx-xxxx and other Trademark questions should be directed to the Director of Trademarks (404) xxx-xxxx.

✓ Copyrights

- ☐ Every Company work product created by an employee or by a vendor under a "work made for hire" contract have been properly marked with a copyright notice.

It is not necessary to register the copyright in order to place the copyright notice on the work.

Any questions regarding Copyrights should be brought to the attention of the Director of Administration (404) xxx-xxxx.

✓ Proprietary Information

- ☐ All proprietary information has been physically marked by its originator at the bottom center margin using the approved markings.
- ☐ All proprietary information has been securely stored and properly disposed.
- ☐ An NDA or IEA has been executed due to the necessity of sharing Company proprietary information in order to discuss or negotiate a potential business relationship, and:
 - ⇒ only the minimum amount of proprietary information necessary to facilitate our business purposes has been shared or received; and
 - ⇒ any necessary patent applications have been filed prior to such disclosures.

Any questions regarding proprietary information should be brought to the attention of the Director of Administration (404) xxx-xxxx.

Ownership

- ☐ Before any development work to be done by an outside vendor (such as software, training courses or advertising) is begun, a specific written contract has been executed ensuring that Company will be the owner of the intellectual property rights in the developed technology, or work of authorship. (see Executive Directive 12).

Any questions regarding Ownership should be brought to the attention of the Vice President of Company Intellectual Property Management Corporation (404) xxx-xxxx.

✓ Marketing

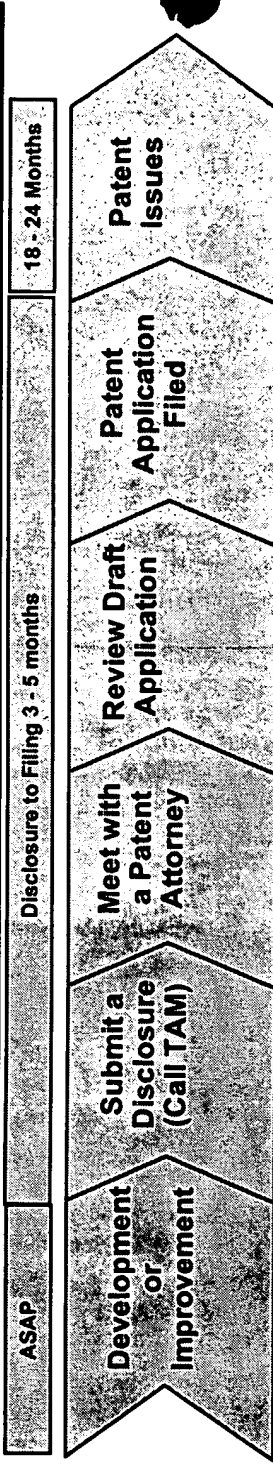
Company's policy is to maximize the value from its intellectual property.

- ☐ Opportunities to outmarket Company technology, software, systems, processes or other intellectual property to another company have been identified.

Any marketing opportunities should be brought to the attention of the Vice President of Company Intellectual Property Marketing Corporation (404) xxx-xxxx.

Patent Process Life Cycle

Patent Timeline:



Task :

- Developments or Improvements created by company employees or with company resources should be brought to IP Protection's attention
- *Review for technical merit*
- *Initial marketing potential analyzed*
- *Administrative procedures addressed*
- *Disclose:*
 - State of industry will prepare at least 1 draft application
 - Sufficient detail such that someone of your expertise could replicate the comments
- Outside attorney

Time Frame:

- We have 1 year from the time an invention is publicly used or disclosed in which to seek US patent protection
- 2-8 weeks for disclosure preparation for Outside Attorney
- Mtg: 1.5 - 2 hrs
- Mtg scheduled 1-2 wks in advance
- Outside attorneys are flown in for mtg
- Attorney Prep: 6-8 weeks
- Inventor given 2 weeks to review & return to IP Protection
- 4 Weeks to receive official filing notice from the US Patent Office
- 12-18 months

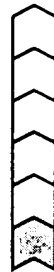
Innovation Award:

- Receive a Disclosure Gift

Achievement Award:

- Each inventor receives \$1000
- Each inventor receives \$2000
- If this is an inventor's 5th company patent, he/she will receive an additional \$2500
- 10th Issued Company Patent: Additional \$5000
- >14th Issued Company Patent: Nominated for General Award

FIG. 221



Innovations

What's Patentable?

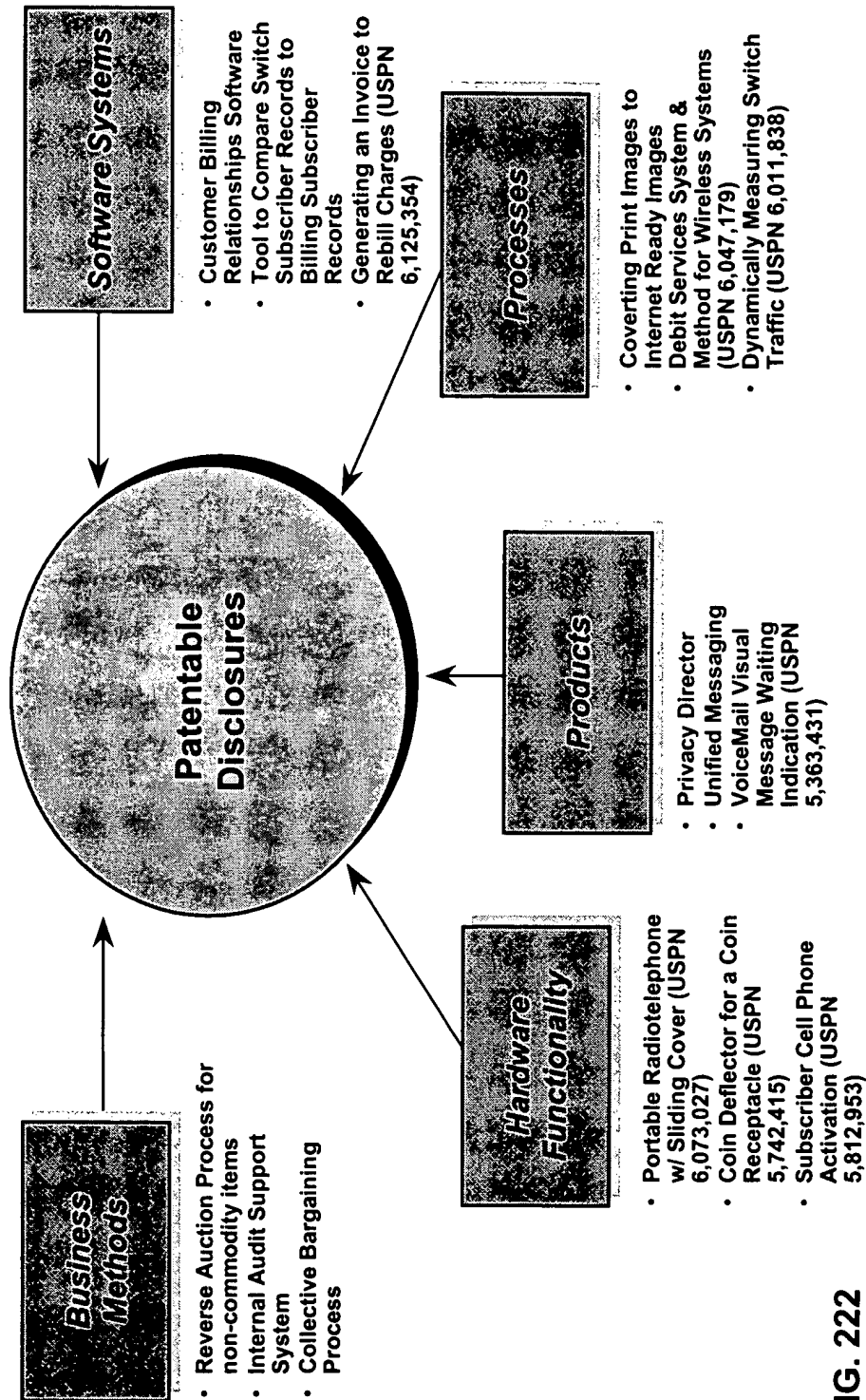


FIG. 222

Internal Auditor

Inventor

- **Identify innovations within your organization:**

- Developed or improved a process or service?
- Created a method of doing business?
- Improved efficiency or cut costs?

- **Innovation:**

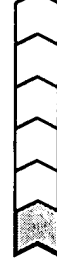
- Developments or improvements by you, the employee or
- Developments or improvements created with resources

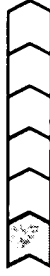
IP Ambassador

- **Raising Awareness of Intellectual Property:**

- Assist in the education of employees
- Identify intellectual property risks to business objectives
- Identify intellectual property controls to those risks
- Where appropriate, suggest IP inclusion to organizations modifying their business process.

FIG. 223





Internal Audit & the Checklist

Sample Business Process

Business Objectives	Transition Product to Trial Testing	Integrate Product w/ Current Service Offerings	Product to Market by Goal	Produce Savings	Decrease employee turnover ratio
Potential Risks	<ul style="list-style-type: none"> • Delay in contract negotiations 	<ul style="list-style-type: none"> • Vendor's architecture incompatible • Contract Disputes 	<ul style="list-style-type: none"> • Project delayed by missed deadlines • Unable to market product as intended due to Trademark Issues 	<ul style="list-style-type: none"> • Increased development al costs • Product released to <50% of Market in 2001 • Costly Overhead 	<ul style="list-style-type: none"> • Employee Incentive Programs too costly • Access to Senior Mgt too bureaucratic • Limited Budget for Salary Increases
Controls	<ul style="list-style-type: none"> • Seek Patent Protection early • Ensure proprietary info properly marked 	<ul style="list-style-type: none"> • Ensure Ownership • Seek Patent Protection • Ensure Proprietary Markings 	<ul style="list-style-type: none"> • Contact Trademark & Corporate Identity Directors early in Process 	<ul style="list-style-type: none"> • Identify outmarket opportunities 	<ul style="list-style-type: none"> • Encourage innovation through the Innovation Awards Program

As an internal auditor, you can help educate the organization on the importance of intellectual property.

FIG. 224

90% of All Revenues Are Credited towards the Entity That Owns the IP Asset

Product licensing is a simple process:

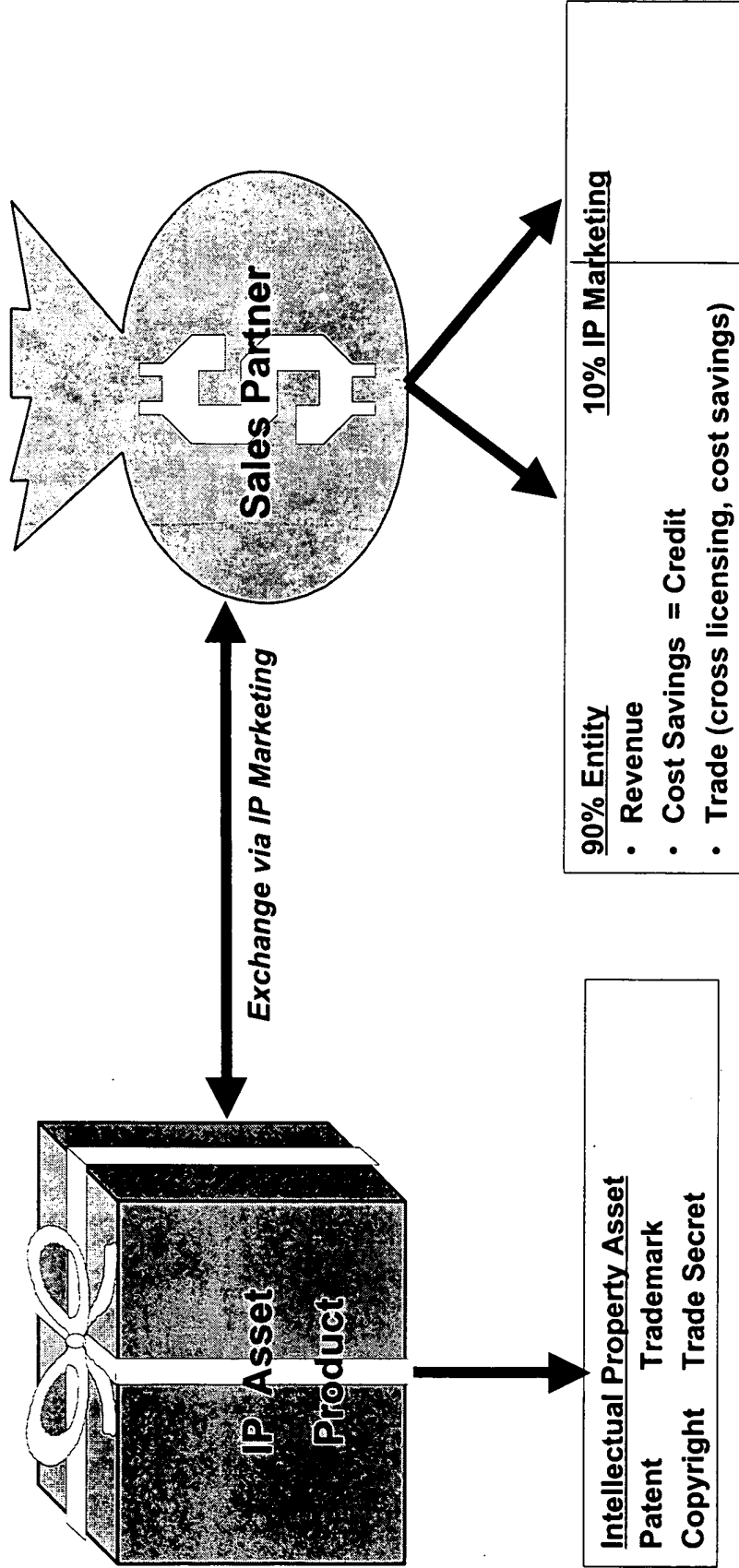


FIG. 225

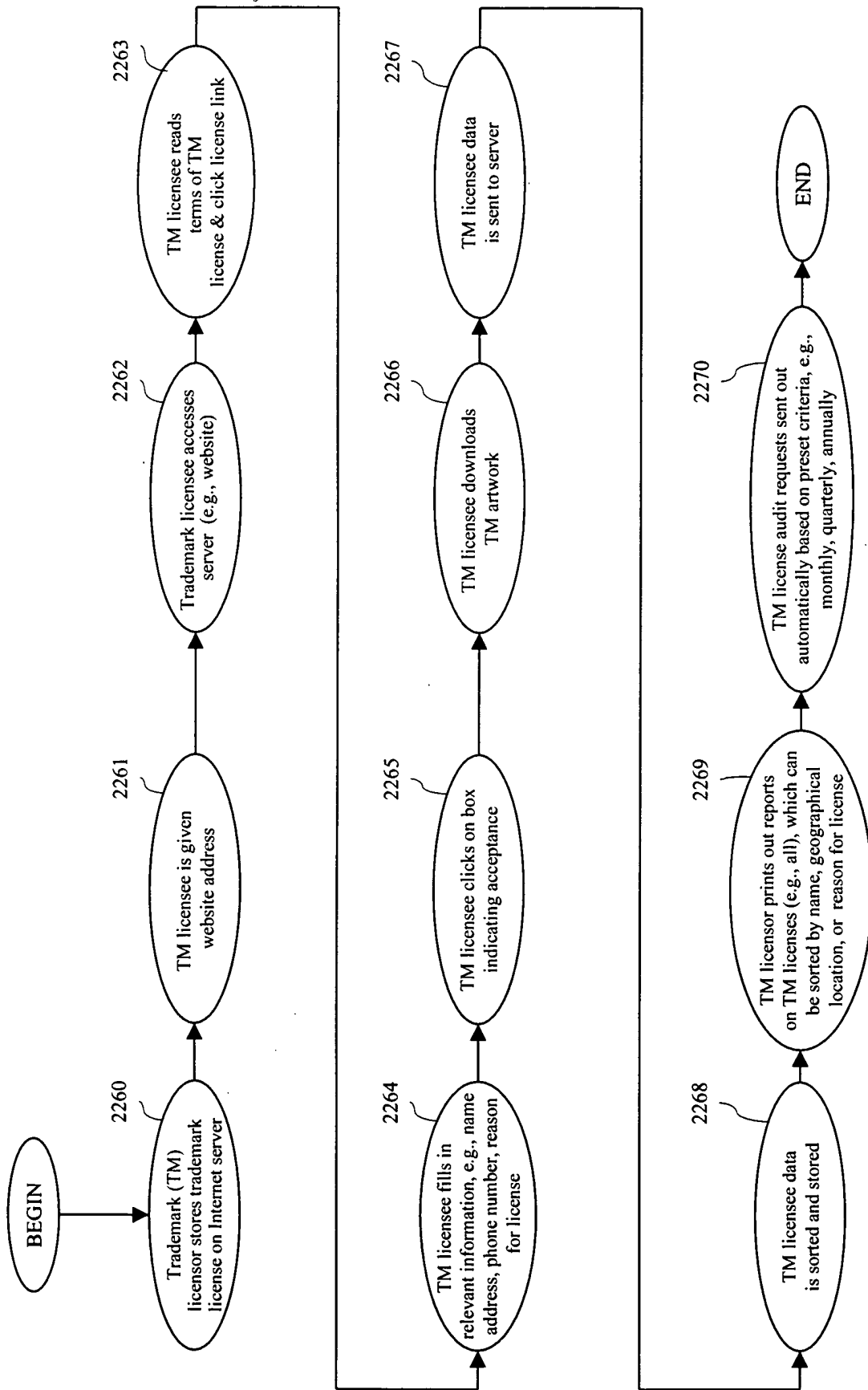


FIG. 226